Praise for
Take Your Marketing Online! Proven Ways to Grow Your Firm in the Digital Age

"While it's impossible to receive a one-size-fits-all marketing plan, Bonnie manages to provide readers with enough guidance, tips and tools to help even the marketing-adverse develop relevant marketing strategies and tactics. Online marketing has never been so easy to understand or implement."

—Katie Tolin, Regional Marketing Director, BDO, Immediate Past President (2014–2015), Association for Accounting Marketing

"With digital marketing changing so quickly, it may seem hard or intimidating for some to try to keep up. Even given these constant changes, this book provides a good solid foundation for newcomers to digital marketing while also providing some new insights for those who've been around the digital marketing block. So whether you're looking to get started or just want confirm you've got your bases covered already, there's something in here for all experience levels."

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"As far as I'm concerned, this is a "must-read" book for any accounting firm that wants to grow. It's thorough, insightful, and most importantly filled with practical ideas on how to implement sound marketing principles. Bonnie's done a masterful job of bringing a very complex field of information together into a clear, well-written marketing "bible" that can help any firm develop and implement a very effective marketing plan. Well done!"

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TAKE YOUR MARKETING ONLINE!

Proven Ways to GROW YOUR FIRM in the Digital Age

16756-344

Bonnie Buol Ruszczyk
with Kelly Lucas and Sarah Warlick

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Preface

When the AICPA approached me about writing this book, I was thrilled and terrified in equal parts. It's an unbelievable honor to be considered enough of an expert to write a book on a particular topic, so my immediate response was, "Of course I'll do it!" Then, once the dust settled, I had to figure out how to write a compelling and useful tome while still running a marketing firm and keeping our clients happy. Although it wasn't easy, I'm incredibly glad I didn't hesitate to say yes when asked (though I'm happy it is now done!).

Technology and online marketing methods change rapidly and will continue to do so. For that reason, I tried my best to create a resource that will stand the test of time by providing strategic advice in addition to practical "how-to" tips for a particular tactic. Social media platforms are likely to come and go, but the tips and tricks should remain valid. I also provided various worksheets and checklists that I hope you find helpful as you read the book. My goals are for you to feel confident creating or expanding your firm's presence online and to enable you to reap the rewards of your efforts.

I welcome your questions, comments, and input as you read this book and take advantage of its resources. My firm's website is bbrmarketing.com, and you can find my contact information there. Make sure you connect, follow, and link to me (and the rest of my team, too) as you start growing your social media presence. And please let us know what has worked for your firm. We love telling stories, so yours might just be the topic of our next blog post!

Happy reading! May your firm grow and thrive through your online marketing efforts.

Acknowledgments

First and foremost, I'd like to thank Kelly Lucas and Sarah Warlick for their willingness to take on this writing adventure and for their invaluable input on this book. I could not have written this book without them.

The rest of my team at bbr marketing deserves a great deal of thanks, too. While I was focusing on writing this book, they willingly and happily picked up the slack left by my diverted focus, ensuring that our clients were happy and the work was done. Thanks Shauna, Tina, and Maddy.

I'd also like to thank those who helped by providing their input and expertise, particularly Walker Oxley of Oxley Internet for his SEO knowledge. It's great to have such a smart and honest SEO expert in your corner; without his input, the SEO chapter wouldn't have come together.

A great thanks to Claudia Coplon Clements, not only for allowing me to use Steve's tips for overcoming stage fright, but even more so for checking in on me regularly to ask about the book and encouraging me to keep at it.

Thanks to the entire accounting marketing community, especially the Association for Accounting Marketing, for being so willing to share ideas, encourage each other, and overlook competitive issues. I'm often amazed and regularly touched by how the people in this industry are willing to go the extra mile to help each other and, by doing so, the industry as a whole.

Erin Valentine, my AICPA editor, deserves kudos for her patience, encouragement, and always insightful edits and suggestions. Her partnership throughout this process has been a joy.

Finally, I'd like to thank my wonderful husband, Paul, and our incredible circle of friends for their honesty, support, and all the laughter we share. I depended on those Friday night therapy sessions at Thinking Man more than you realize and am grateful for your undying love and encouragement.

About the Author

Bonnie Buol Ruszczyk is president and founder of bbr marketing, a firm that specializes in marketing strategy, plans, and tactical implementation for professional services firms. With more than 20 years of marketing experience, Bonnie is a woman whose work quality is exceeded only by her determination to constantly better herself and her craft.

As president of bbr marketing, Bonnie has relished the challenges of entrepreneurship as she worked to grow and nurture a new business. Since the firm's inception in 2009, Bonnie has led the young company to become widely recognized and respected within the professional services marketing niche, with award-winning client work and an outstanding history of business success.

Bonnie was recognized in 2012 and 2013 as one of *Accounting Today*'s Top 100 Most Influential People and is in great demand as a consultant, speaker, and leader at various industry events. She is a founding member of the Atlanta Independent Women's Network and is the Atlanta chapter president of the Association for Accounting Marketing.

Before founding her own firm, Bonnie wore many hats. Her roles included public relations director for a health and fitness startup in Silicon Valley, which allowed her to see the dotcom boom and bust firsthand; international marketing manager for Turner Broadcasting, where she helped launch TNT and Cartoon Network in Asia; and creative managerial roles with software and financial services firms,

which laid the foundation for her passion and expertise for professional services marketing.

When not busy running the business, Bonnie enjoys spending time with her husband and their two dogs, reading, writing, renovating her attic, cooking, and hanging out with friends (she throws a mean party). She's passionate about The Crohn's & Colitis Foundation and raised over $5,000 for the group for the Miami ING half marathon, which she trained for and completed in 2008.

Chapter 1
A Long and Winding Road

Accounting marketing has an interesting, albeit fairly short, history. Many firm partners still remember the days when it was against AICPA rules to advertise, market, directly solicit, or even participate in competitive bidding. Virtually non-existent for most of the 20th century, the practice has evolved at a rather slow pace even since the rules were changed. In some cases, any increase in firm marketing has been despite the objection of firm leadership because longer-standing partners recall the earlier proscription. Although the reluctance is slowly dissipating, some baby boomers who cut their teeth in the 1970s still have a bit of an aversion toward the whole idea of marketing their services.

Like kids who could suddenly pick out their own school clothes after years of wearing a uniform, most firms found the change a bit overwhelming when the ban was lifted. Suddenly adding marketing to the mix of firm operations created an atmosphere where thinking creatively was an asset, and the shift cast most accounting professionals into a sea of uncertainty. What should we do? Who will be responsible for it? Isn't it just tacky to advertise? Who will pay for it, and how much should we set aside for it? Can't we just wait for referrals to come our way like we always did? The questions were endless and drove more than a few firms and practitioners to simply put off the decision and stick with the status quo.

It's strange to think that there was a time when there was no such thing as accounting marketing, nor were there any accounting marketers. Hard

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as it is to imagine, the profession many of us take for granted simply didn't exist 35 years ago! But it did develop over time, and, not surprisingly, it was the Big 8 (or Big 5 or Big 4, take your pick) that led the charge. Armed with budgets that were the envy of smaller firms, these industry giants found it easy to test out the fresh opportunities. By the mid-90s, the big dogs were spending millions of dollars on advertising.

The small to mid-sized firms that opted to follow the lead of the larger, international firms began to see the benefits of investing in marketing as well, though still very conservatively. By the mid-90s, many of them had firm brochures that they could hand to clients when needed; they might have spruced up their stationery and business cards a bit to look more distinctive. Some were probably even wondering quietly whether there was any advantage to creating a website, although few made that leap until several years later.

THE SLOW CLIMB

Accounting marketing got a very late start, which was followed by reluctance and confusion on how to use this newfound power. But by the mid-90s, things started changing, and at a pretty rapid pace too. The Association for Accounting Marketing, which began in 1988, had more than 200 participants at its annual summit by 1995. The fledging concept of professional firm marketing was off to the races, and firms that were taking advantage of their marketing freedom were seeing the results of their efforts. Over time, nearly every firm started implementing some form of marketing. Whether it was developing brochures and other print materials, mailing a newsletter each month, actively seeking out press coverage, or inviting local bankers in for a lunch and learn, firms were moving forward. By the end of the 1990s and into the early 2000s, quite a few firms had created and launched very simple websites, most by simply taking their brochure content and tossing it online. These early websites were rarely revised or even reviewed once they were up; they represented a significant development but remained a far cry from the carefully crafted, interactive sites of today.

Well into the 2000s (and sometimes even today), accounting marketers would hear partners grumble about the dollars spent on marketing and field questions about the lack of immediate return on investment. That difficulty in demonstrating an instant payoff remains a challenge for many accounting marketers. Unlike most industries where marketing is considered an investment, many in the accounting profession see it as an expense, and one that is hard to measure and account for. Much of the benefit is virtually unquantifiable: how do you put a value on strong branding, goodwill, or respect? For that matter, how do you measure such accomplishments?

A Brief History of Accounting Advertising

In the early 1900s, accounting firms would alert potential clients to their services by purchasing advertisements in city directories or creating and handing out flyers. It sounds pretty reasonable, but the American Institute of Accountants, which eventually became the American Institute of Certified Public Accountants (AICPA), was not fond of this self-promotion. To put an end to the practice, in 1922 they banned nearly all forms of promotion for public accounting firms. This was not unique to CPAs either; similar restrictions were put in place by the associations representing lawyers, doctors, and other professional services providers.

Not long afterward, the rule was expanded to include a prohibition against "direct solicitation," which covered any uninvited in-person visits, conversations, or telephone calls to a potential client. Taken to the *n*th degree, a CPA could be sanctioned for simply striking up a conversation with someone on the subway about her profession. Decades later, the Federal Trade Commission (FTC) posited that the prohibitions against advertising were illegally restricting trade among the professions and began pressuring the associations to get rid of these rules.

Despite how over-the-top it all sounds to those of us who didn't work under these rules, this provision wasn't overturned by the AICPA until 1978, after AICPA members adjusted Rule 502 of the *Code of Professional Conduct* to allow advertising that was not "false, misleading or deceptive," commonly referred to as the "Bates Decision" in reference to the U.S. Supreme Court case *Bates v. State Bar of Arizona*. Even then, a handful of state societies kept the rule in place for their members. In fact, it wasn't until 1985, when a CPA named Scott Fane sued the Florida State Board of Accountancy for violation of free speech, that it was overturned for good. The case went all the way to the U.S. Supreme Court, which finally struck down the restriction on direct solicitation by a vote of 8 to 1.

These original restrictions led to a lasting feeling that it was unseemly for professional services firms to advertise in any way, regardless of whether the content was informational or accurate. Falling somewhere between wearing white before Easter and stealing your neighbor's lawn furniture, self-promotion and direct solicitation was something you just didn't do for many years. Even after the legality of marketing accounting services had been clearly established, most firms were very slow to take advantage of their newly secured marketing freedom.[1]

[1] Clikeman, Paul M. *Called to Account: Financial Frauds that Shaped the Accounting Profession*. Second Edition. New York: Routledge, 2013.

CONSISTENCY AND COMMITMENT ARE KEY

Unlike a single purchase, such as a car or a computer, where the cost is upfront and the benefits are tangible and immediate, marketing is a process. Successful marketing delivers incremental results by starting slowly and building on earlier progress. The reality is that marketing is more akin to going to the gym than many firm leaders recognize. No matter how enthusiastically and diligently you begin your workout program, you're not going to be able to flaunt washboard abs and a svelte new shape in only a few weeks. Instead, you show up at the gym at six each morning and sweat, only to be rewarded with sore muscles and a stubbornly unmoving scale needle. Likewise with marketing, the payoff takes consistent effort and a prolonged commitment to your plan. But even with the best planning and most diligent work, it takes time to see the fruits of your labors.

If you lose interest within a month or two, trying out different fitness machines and classes and showing up less often before eventually giving up, you'll end up with no demonstrable progress. That doesn't imply that your workouts had no value, only that you weren't measuring their value accurately. Conversely, you can't use *every* machine or show up at every spin class, or spend all day, every day in the gym. You need a plan that works for you. Ideally, you'll consult with a trainer to assess your current fitness level and help you design an effective improvement plan tailored for your specific needs and abilities. You'll select a few machines or classes, or a combination of both, and establish a workout routine that matches your goals while working within the time and energy you have available to devote to your new fitness initiative. You'll be wary of over-committing time or energy (which could result in a quick burnout) or spending too much money on equipment you don't really need. You'll definitely select a variety of exercises to keep from getting so bored you can't make yourself do one more rep.

This exercise analogy highlights another lingering challenge posed by the veteran guard of marketing-averse partners. Even if they grudgingly agree to approve a bit of marketing, few of them want to take chances with creativity. Instead of starting from scratch and crafting messages that are unique to their firms, they tend to prefer messaging that is nearly identical to that of their competitors down the road. They'll often go so far as to ask those responsible for marketing to copy the tactics of competing firms. In fact, we have found it all too common that if you were to remove the names from five random CPA firm websites, it would become nearly impossible to distinguish one from the other based on their language and branding.

Which brings us to today's standards of accounting marketing. Though many firm marketers still fight uphill battles to get the recognition and

budget they need and deserve, the situation overall is much better than it was even 10 years ago. It's rare that anyone asks *if* a firm needs a website; more commonly the discussion centers on what the website should contain. More and more, partners are discussing what differentiates them from their competition, allowing their firms to compete more easily and effectively and not fall into the trap of commoditization in the eyes of their audiences. Social media is gaining greater acceptance because its benefits are more understood and its low cost embraced by budget-conscious firms. In essence, firms are making the shift from one-way (also known as "push" or "outbound") marketing to two-way (or "pull" or "inbound") marketing.

PUSH VERSUS PULL MARKETING

At the risk of getting too deep into marketing minutia, I do want to take a moment to explain one of the biggest shifts that marketing has ever seen: push versus pull marketing.

Push Marketing

Also referred to as "outbound" or "one-way marketing," push marketing describes what most businesses have been doing for ages. Basically, it's when a company "pushes" a message to an audience in the hopes that the audience will see it and respond. No two-way interaction is expected in most cases. The ultimate goal is to get someone to call your firm, buy your car, order your alarm service, and so on. Push marketing, when done well, delivers your firm into the laps of those who might need your services. It gives people information they weren't actively looking for but might be willing to act on once they have been presented with your message. Direct mail campaigns such as clothing catalogs or election mailers are perfect examples of push marketing.

Pull Marketing

Pull marketing, of course, takes the opposite approach. These efforts are meant to "pull" a client to your firm or business. Today's Internet-savvy consumer would never consider making a major purchase without conducting research, much of which is done online. Firms that are adept at pull marketing have information in place that these research-happy prospects can find, immediately giving the firms a leg up on competitors that don't market this way. Pull marketing is the messaging you create to be found by those who are actively seeking information on a topic or who are looking for a provider. Blogging, social media participation, and

search engine optimization are all good examples of pull efforts. By employing these strategies, accounting firms help to ensure that they will be found by potential clients who are taking an active role in exploring some aspect of the firms' services.

Think about it this way: you've just moved to a new neighborhood and need to find a dentist. In most cases, your efforts will be assisted by a combination of push and pull marketing tactics. You may receive a postcard from the local dentist that hits at just the right time (push). You may see a billboard or bus bench ad on your way to work about a local dental practice (push). You may ask for recommendations from your Facebook friends, who then direct you to their dentist's social media pages (pull). Or you'll conduct a web search for dental offices within 10 miles of your new home and click through to their websites (pull). You may even get a telemarketing call from a local provider (push). In the end, you will weigh the pros and cons of your options and make a decision about who gets to take care of your missing filling based on the cumulative information you have at hand.

Pull marketing is certainly seeing a surge in popularity—much of this book will discuss how to take advantage of these inbound tactics—but it's a fool's errand to toss out all push marketing. Many people are turned off by push marketing and will automatically discard or tune out the messages they receive this way. Sometimes, though, push marketing delivers the right message at the opportune moment, and there are audiences that pull marketing will never reach. Ultimately, it is the firm that can find the right balance of both methods that will get the best results.

No two firms are alike, either. This is why you won't find a standardized checklist in these pages, where you just insert your firm name into a template and then sit back and watch the calls and emails come rolling in. Marketing is much more of an art than a science. Finding what makes your firm unique and communicating that in the most effective way possible isn't always easy, but those who make the effort to identify and properly share their message will definitely see powerful results. And just as with fitness, marketing progress starts slowly. With a consistent, well-planned effort, marketing's benefits can extend beyond the original expectations.

Interview: Suzanne Verity, Association for Accounting Marketing (AAM) Founder and Life-Long Accounting Marketing Champion

Suzanne saw the future of accounting marketing long before most people had any idea what to do with it. In addition to founding the Association for Accounting Marketing, she is an award-winning communications professional and expert marketer who has held a variety of roles in the industry.

Tell me about how and when you got into accounting marketing and what role you played.

In 1984, my first year out of college, I interviewed for a job with Professional Publications, an Atlanta-based newsletter company. Owner and president Robert Palmer, a CPA, started *Public Accounting Report* from his kitchen table. To my knowledge, it was the first independent publication—meaning no advertising—devoted to coverage of the accounting profession. Bob had the inspiration and foresight to branch out from there to offer a full family of newsletters covering multiple aspects of the business of running a public accounting firm. My assignment (because I did land the job!) was *CPA Marketing Report*.

How did you see the *Bates* decision affecting the industry and how CPAs went about "marketing" themselves and their firms?

Bates encouraged accountants to dip their toes in the water in terms of how they went about getting new business. I came in five years post-*Bates*, and it was about that time when the first marketing positions were being created. Even so, we were a long way from acceptance of marketing as a respected in-house function or marketers as strategic contributors. Arthur Andersen was probably the first of the then-12 global firms to have a full complement of high-level marketing professionals. At most firms below that level, however, often it was the managing partner's secretary (and that's what they were called back then) or, if the firm was big enough, the office manager or firm administrator who would "draw the short straw" to add marketing, whatever-the-heck that was, to her duties. As for the duties . . . database and contact management (without the technology to manage the function), direct marketing (of the snail-mail variety), collecting information about Yellow Pages advertising (and how to secure better placement than AAA Accounting Services in the alphabetical arrangement)! So, at that time, *Bates* was primarily a boon to the Yellow Pages, creating new listing categories for accountants and attorneys!

(Continued)

You hear the same kind of conversation about websites now: "I guess we'll do one, but no one will find us on the web." And . . .

And they do. That's exactly right. Yesterday's Yellow Pages ads were the precursors and counterparts of today's social media. In the beginning of accounting marketing, would-be clients leafed through the Yellow Pages; now they turn to Google. Search engine optimization is today's equivalent of making a decision about the placement of your ad, how much space to buy, and all that. So it's old school and new. The principle is still there.

So in 1984 were firms excited to have the opportunity to market themselves or were they unsure of what marketing was?

Excited? Not! Unsure, for sure. Most firms referred to what we call marketing and business development today as practice development then, or, even one step removed, practice management. I think that says something. I think most firms embraced marketing begrudgingly at first. The partners saw it as a necessary evil, a far-from-proven support function that added to overhead and subtracted from their draw.

So was it just considered unseemly to admit that you want to grow?

At that time I don't think they associated marketing with growth.

What events did the most to shift the perception towards recognizing marketing as useful and acceptable rather than horribly gauche?

I think the AICPA did a good job of jumping in early on to create conferences, programs, and resources related to marketing. The annual Practice Management Conference was the main attraction. Marketing was added to the topical mix, and that's also when non-accountants who had been hired to handle marketing duties began intermingling with partners.

Do you remember certain early accounting marketing campaigns that may have been particularly effective?

I remember an out-of-the-box advertising campaign that won kudos and awards for a regional firm based in Minneapolis. The marketing director there used her allotted time at the firm management retreat for arts and crafts.

Luckily, the partners played along. They grabbed crayons, finger paints, construction paper, and paste to create self-portraits. The idea was to portray them outside of their accounting persona, to reflect their hobbies and special interests. The final masterpieces were featured in a series of advertisements in the city business journal. The firm and the partners received many calls and comments because their self-portraits

and the campaign theme broke stereotypes. The relaxed creativity left clients with the impression that the same creativity would be applied to their business matters and the firm's solutions.

How long did it take for most firms to designate funds and create a real marketing budget? I ask that with the knowledge that quite a few firms still don't have a marketing budget today.

I would say that the mid-90s was about the time when firms, in number, started to consider marketing as a legitimate business function and organize as such. Around this time, marketing at big firms was finally broken out as a dedicated cost/revenue center, with defined goals and expectations. For a large number of firms, for instance most of those within *Public Accounting Firm*'s Top 100, marketing stopped being a sideline of the firm administrator or an after-hours commitment begrudgingly taken on by an assigned partner-in-charge.

What do you find most surprising or even shocking about accounting marketing?

I think marketing is finally coming into its own as a business discipline within the profession of public accounting, across the board. It was always baffling to me that CPAs took so long to acknowledge marketing and sales as a necessary investment to grow their firms because they wouldn't advise their clients to go without such. I think it all goes back to the essence of the accounting profession itself. What we are selling is intangible for the most part: relationships, brainpower, expertise, rapport. The most successful accounting marketers are experts at personification, and there must be a symbiotic relationship with the public accounting professionals they are working for. This is a business in which marketers cannot be disembodied from the firms they serve; they must be fully integrated with mutual dependency.

What do you have to say to today's accounting marketers?

Hats off to those who stuck it out and paved the way as pioneers in what was basically a hostile environment. Their successors still need a pioneering spirit because marketing itself changes along with the business of accounting. Social media has changed everything when it comes to reaching out, getting attention, closing deals, making money. Whether it's the firm itself or even its clients, it's just all different.

And I think working in that environment as a marketer is fun and challenging. When I tell people that I have worked with accountants for the majority of my career, they kind of want to console me. I tell them they are dead wrong, that it's an exciting beat for me. CPAs are

(Continued)

entrepreneurs at heart, and public accounting is at the heart of the business world and our economy. Partners are a lot like doctors in a way. They go into their field because they love to help their clients, just like doctors want to diagnose and heal their clients and prevent problems in the future. CPAs have that same drive to help and heal. And the ones who are good at it make a good living along the way. CPAs are business people for sure, but I also think there is a lot of altruism there, I really do. I think they are good people to work for.

And good marketing will let everyone know that fact.

Chapter 2

Where Are You Headed? The Importance of a Marketing Plan

"Road trip!" There was a day when those words would elicit great excitement and anticipation in most of us. But as we've matured, the idea of throwing a toothbrush and bathing suit in a bag and jumping in the car with some recent acquaintances isn't quite as appealing.

Although throwing some caution to the wind might sound appealing, we all know that a good road trip or family vacation takes a huge amount of actual planning. First, where do you want to go? What do you want to see along the way and when you finally get to your destination? What clothing will you need for the weather where you'll be? Does it make more sense to drive or fly, and which option will cost you less or be more fun? Who are you taking with you? Is this a romantic getaway for you and your spouse or a trip where the kids come along? How long will you be gone and who will take care of the pets and mail while you're away?

Spontaneity sounds sexy, but ultimately we all know that proper planning is important. This goes for most things in our lives really. You wouldn't buy a house without looking into the neighborhood, insisting

Take Your Marketing Online!: Proven Ways to Grow your Firm in the Digital Age, 2nd Edition. Bonnie Buol Ruszczyk, Kelly Lucas and Sarah Warlick.

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on an inspection, and assessing whether it will fit your family's needs. Your car purchase involves much more than going to the lot and plopping down some cash. For most people the process includes online research, talking to friends and family, and looking at the interest rates you can get on a car loan. You even plan your lunch hour so you can get the food you are craving and still have time to run by the pharmacy to pick up your prescription and a gallon of milk for tomorrow's breakfast cereal.

Admit it: we have to be responsible planners or else very little gets done. Yet I find that the same attention is rarely devoted to the way accounting firms market their services. This isn't meant as a criticism because most CPAs simply don't think about marketing this way. But it's a serious oversight because careful strategic planning is vital to getting the results you want. Too often I've seen firms jump on social media because the competitor down the street did without thinking about why they decided to make that move. Or they might add a new service to compete with that firm that drives them nuts because that firm seems to be growing at a much faster pace than their own. This "fly by the seat of your pants" type of marketing strategy might work from time to time in the same way that tossing darts blindfolded may eventually turn up a bull's eye. But wouldn't you rather spend your money and time doing things that are well planned and more likely to yield the results you want? This is where a marketing plan can help your firm.

So what does creating a strategic marketing plan entail? Don't worry; it's not as hard as you may think. More than anything else, it requires that you take a *very* close look at your firm and what you want to accomplish. In this chapter, I will go into some of the sections that your plan should contain and the questions you will need to answer carefully and honestly to uncover the best marketing strategy for YOUR firm. Marketing plans are not one-size-fits-all.

BUILDING YOUR MARKETING PLAN

A marketing plan should define what your firm is going to do over a period of time, perhaps one to two years, to secure your place as a recognized firm in the industry and with the markets you want to serve. Always keep in mind that marketing is a process, not an event. I hate to break it to you, but you never get to check marketing off your to do list completely.

Additionally, your marketing plan should not be a big document that sits on a shelf collecting dust once it's written. It should be your frequently consulted road map for how you are going to make clients and prospects aware of your services on a continual basis. Just having a marketing plan does not guarantee success either. If the plan isn't carefully considered

with input from all supporting functions, it will most likely fail. The same is true if the goals, objectives, or action plan are unrealistic or not measurable.

Business Analysis

Services

It's important to clearly define your services. Now, before you roll your eyes at me and say, "Duh, we offer accounting services," let's take a deeper look at what you really do. **Make a list of your primary services as well as those that you offer from time to time.** Go into more detail than "tax" and "audit." Do you focus mostly on pure compliance work or do you offer quite a bit of planning as well? Do you offer accounting services like bookkeeping and back office outsourcing for your small business clients? Have you recently added a risk advisory offering that you want to see grow? Take a bit of time and be as thorough as possible.

Now **think about the benefits that these services provide to your clients**. As with nearly everything in this plan, it is important to think about what you do from the clients' perspective, not just yours. Are you simply keeping them out of jail by filing tax returns on time, or are you doing more for them and their businesses? You may want to ask a few of your clients what they see as the benefits of the services you provide because their perspective might be different than you expect. Peace of mind, time to focus on other functions, and important financial advice may rise to the top here. Your clients might surprise you with completely different answers. Either way, they should have no trouble identifying what it is they get out of the services you're providing. You can offer all the services in the world, but if your clients don't see value in them, it's wasted effort.

Do you know which of your service offerings is the most profitable? I'm surprised that many accounting professionals can't answer this question for their own services even though they may spend all day helping their clients figure out this information. Much like the benefits we've already discussed, if you are losing money or merely breaking even with a particular service, should you really go out of your way to promote it? If you haven't already, take a careful look at what percentage of your revenue comes from the different services you offer and the realization you get from each one. Go back at least three years on this exercise to ensure you aren't focusing on anomalies but instead getting a clear picture of your firm's revenue sources and the services that are most profitable.

On the flipside, **which of your services earns the most positive feedback?** Your clients are a great source for this information, and it may

help you determine which service(s) should be the focus of your marketing efforts. You may be the best provider for litigation services, but if your clients don't need it or think you excel in this area, it might not be all that important for your firm to focus its marketing efforts here.

Finally, **which of your services would you like to see grow the most?** You may offer many more services than those that you actively market. This is common and, in most cases, recommended. You don't have to create campaigns around everything you do. Ideally, you want to focus your marketing efforts on no more than a handful of your services, otherwise it's hard to develop clear messaging, and your efforts will get muddied in the mind of your target audience.

By answering these questions and those that we will include in the rest of this chapter, you should be able to clearly identify the services that bring in the most revenue or, ideally, create the most profit for your firm. Hopefully those are the same services that your clients most value. If you're very lucky, they are the services you enjoy providing and have the staff to support. See exhibit 2-1 to help you make your own list.

Exhibit 2-1: Marketing Plan Questionnaire

Service Area(s) Description

1. What do you see as your primary service offerings?
2. What benefits do these services provide to your clients?
3. Which of your services are the most profitable?
4. Which services do you receive the most positive feedback about?
5. Which services would you like to grow the most?

Market Analysis and Competition

1. Who are your primary competitors?
2. How do they position themselves?
3. How is the overall market for the services you provide (market demand)?
4. Are there current perceptions of your firm in the market?
5. If so, are you happy with these perceptions? Any you'd like to change?

Exhibit 2-1: Marketing Plan Questionnaire—*(continued)*

6. Are there things your competition does that you like or dislike?
7. Where are your potential clients likely to be? What do they read? Where do they go for information?

Differentiators

1. What sets you apart from your competitors?
2. What do you do that others can't or don't do?
3. What do you do best and better than all of your competitors?
4. Does your differentiator(s) translate to a meaningful benefit for potential clients (do they care)?
5. Is your differentiator(s) something that you will be able to deliver consistently and over the long term?

Client Base

1. Who is your ideal client(s)? List in order of preference.
2. Describe your current ideal client(s) in terms of demographics and psychographics.
3. Are the majority of your clients from a particular industry, in a certain age group, or share other characteristics?
4. What type of client typically stays for the long term or is a "repeat customer"? Are there any commonalities to your most profitable, long-term clients?

SWOT Analysis:

Strengths

- What do you do exceptionally well?
- What advantages do you have?
- What valuable assets and resources do you have?
- What would your clients identify as your strengths?

Tips:

- Be realistic . . . and honest!
- Think in terms of what you have that your competitors don't have.
- Don't just take an internal perspective. Consider how your clients view your firm.

(continued)

Exhibit 2-1: Marketing Plan Questionnaire—*(continued)*

Weaknesses

- What could you do better?
- What are you criticized for or have received complaints about?
- Where are you vulnerable?

Tips:

- Don't tiptoe around weaknesses; be constructive and positive.
- Get research so you know what outsiders think about you . . . and your competition!

Opportunities

- What opportunities do you know about but have not been able to address?
- Are there emerging trends on which you can capitalize?

Tips:

- Look at changes in the sector represented by the firm, technological changes, government policy, and socio-economic and demographic changes.
- Be open-minded; key opportunities may come from unlikely and seemingly unrelated sources.
- Consider how you can exploit your strengths or address your weaknesses to generate additional opportunities.

Threats

- Are any of your weaknesses likely to make you critically vulnerable?
- What external roadblocks exist that block your progress?
- Are your competitors or quasi-competitors doing anything different?
- Is there significant change coming in your industry or the markets you serve?
- Is technology dramatically changing the sector and services to it?
- Are economic conditions affecting your financial viability?

Tips:

- Have an open and expansive perspective. The buggy whip manufacturing association may not have seen early automobiles as a big threat, but they were!

Competition

Everything would be a whole lot easier if we didn't have to deal with those nasty competitors, wouldn't it? Why in the world do businesses that could be perfect clients for your firm pick the competition instead? Who do they think they are, claiming to have "great people" when you clearly have the best team in town?

Although we may not like to think about it, we all have competition. Some competitors are obvious, and some may fly a bit under the radar. Regardless of how you feel about your competition, it is important to know who it is and what these providers are doing at their firms so you can counter effectively with your own marketing efforts.

First, **make a list of your primary competitors for each of your services**. In most cases, this list will include other local accounting firms—you know, those guys you nod at politely at social events but secretly wish would just go away. This list may also extend beyond your geographic area for some services depending on what you do. For things like bookkeeping services, your competition can be your client's internal staff or cloud solutions like QuickBooks Online or Xero. Be as thorough as you can and make sure you get input from the firm members who work at client sites in the field, if available. They will have even more inside information than those who tend to stay in your office.

Now we should **look at how each of these competitors, the main ones at least, position themselves in the market**. By this I mean: what is their reputation or "personality"? What is *their* marketing strategy? Are they the super buttoned-up, navy blue suit firm that targets only white-collar, high-net-worth individuals and the companies they own? Or do they have a more laid-back reputation, host an annual pig roast, and work with the blue-collar professionals in town? Do they serve a particular industry niche(s) or distinguish themselves as the firm with a high level of expertise in a particular service offering? Are they the firm where college grads go to cut their teeth then move on, or is their employee turnover hovering near zero? Don't let your frustrations with them color your comments. Take an honest look at their positioning and discuss them openly with your team to ensure the list is accurate and complete.

Market Analysis

By now you should have your services clearly defined and have a good picture of your competitive landscape. Let's **focus for a few minutes on the bigger picture of the market in which you operate.** You should include both macro- and micro-elements in these observations to determine how each may affect your firm and also help you determine where it makes the most sense to focus your marketing efforts.

What do I mean by all this? Simply put, you live and operate in a market of some sort and outside elements can affect it. Macro-elements are things like the economy as a whole and the situation faced by the industries you serve. Back in 2008, if you had a real estate focus, it would have paid to determine which other industries you could serve because that one was hit hard and companies were going out of business left and right. Now, if you offer retirement planning or other services valued by the huge baby boomer market, you should be golden. Additionally, look at micro-issues like the prevalence of the type of client you want in your geographic area. Does your target market value the services you provide and can they afford the prices you charge? Where are your potential clients likely to be? Are they large companies in large cities or small start-ups in the suburbs? By taking a bit of time to look at the market as a whole, you will better understand your place in it.

Clients

Now let's take a bit of time to carefully analyze your clients. First of all, **take a look at your current clients and see how they compare to your ideal clients.** Which ones can serve as a template for the type of client you truly desire? If you could clone one or two of your clients, which ones would you choose? Who is the most profitable, or easiest to work with, or the first to pay his invoices? What type of client stays with your firm year after year? This is about who your favorite clients are and what services they purchase from you. What industries are they in and why do they choose to work with you? Dig deep and you'll uncover those ideal clients. Others like them will be the ones you want to target with your marketing efforts.

Now, describe your ideal clients. Go into as much detail as you can and rank their characteristics in order of importance to your firm. Sometimes it helps to think of them in terms of how you would describe your neighbors down the street. How old are they? What type of car do they drive and where do they send their kids to school? Do they pay close attention to the latest fashion trends or stick with sweatpants and sneakers? Are they homebodies or always out at the newest restaurants? Are you more likely to find them at the local pub on Friday night or at a fancy wine tasting? What types of business are they in and how much time do they spend working in the average week? You get the picture. Now create a description like this for your ideal clients.

Differentiators

What if I told you I don't care how great your client service, staff, or firm is? Would you be surprised or offended? Well don't be, even though it's true. If you have managed to stay in business and grow in any way over the years, it's fairly safe to assume you know what you are doing and are

probably pretty good at it. I'm also going on the assumption you never intentionally hire mediocre people or deliver sloppy service. So when I hear a firm talk about how great they are it just looks like navel gazing to me: professionals patting themselves on the back and stroking their own egos.

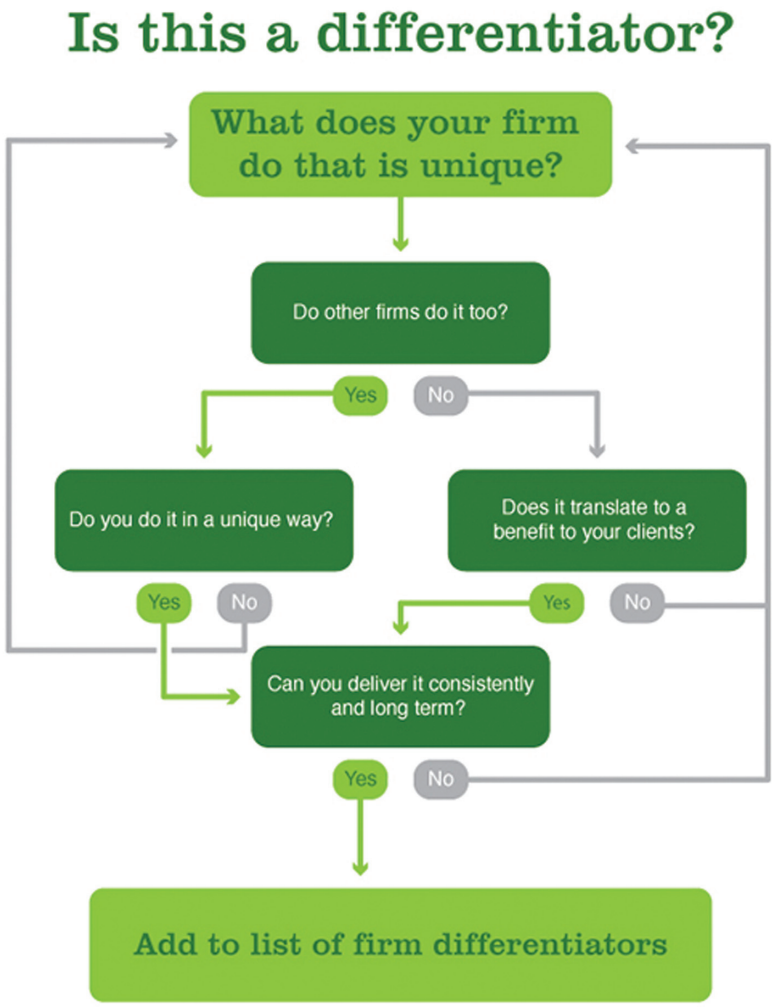
As a client, I want to know what you can do for me and what you have done for others like me. **What makes you different from the other firms** I'm considering, and where do you excel? What do you do that others can't or don't do well, and how will that make my life easier? What do you do best or better than all of your competitors? Can you deliver it over the long term, and does this translate into a meaningful benefit for your potential clients? In other words, should they care? It might be something that you think is vital, but if those who are paying for your services simply don't care about it, your differentiator is irrelevant.

I don't mean to sound harsh here, but this is one of the most important—and admittedly most difficult—things a firm can identify. You can talk until you are blue in the face about your greatness, but as a potential client, I can't wrap my arms around that. It's soft and subjective. But different is something I understand, and so will all of your other potential clients. That is **something that can be defined, described, and proven**. And it will help you position your firm through your marketing efforts and become the core of your messaging. I can't stress this enough. Every one of these areas is important, but if you have to cut corners, don't do it here.

It's now time for a deep breath because we are finished with the overall business analysis portion of your plan. Have you gained a bit more clarity about where your firm fits in the market, who you want to serve, and the services you should market more actively? It is not uncommon for firm partners to be surprised by the results of this activity and for unknown information to surface in the process of answering these questions. This is good! Embrace every new truth you discover because if you don't have a clear picture of your firm then there is no way anyone else will. Next up is the portion that is often referred to as "marketing therapy": the SWOT analysis.

See figure 2-1 for a quick reference guide on how to identify your firm's differentiators.

Figure 2-1: Differentiator Flowchart



SWOT ANALYSIS

You may be familiar with a SWOT analysis, and you may have taken part in one previously. You may have learned about it in a business class, or maybe you are wondering what this all means. A SWOT analysis is simply a way for you to identify your **S**trengths, **W**eaknesses, **O**pportunities, and **T**hreats (see figure 2-2 for an example). Why would

you want to do this? So you can build on your strengths, overcome your weaknesses, take advantage of your opportunities, and address any threats. It puts you at a better competitive advantage and allows you to create better marketing strategies.

Figure 2-2: SWOT Analysis

Strengths
Determine what you do well and build on those strengths as you launch your new business or new products and services.
Weaknesses
Areas of vulnerability that you should either plan around or develop into strengths.
INTERNAL
EXTERNAL
Opportunities
Include shifts in the market and any areas where you see the possibility for growth and expansion.
Threats
Include competitors, but can also include many elements beyond your control, such as new or proposed legislation, a decline in the industry segment and any other outside forces.

Here's the thing though: you have to be completely honest here. I don't mean politely honest. I mean painfully, brutally, no-holds-barred honest. If you aren't, there's really no point in going through this exercise because it will not provide any benefit. Ready? Let's dive in.

Strengths

This is where you get to toot your horn a bit and create a list of all the things you do well. What advantages do you have over other firms? What valuable assets or resources do you have? What do clients identify as your strengths? This can include things like services you provide, unique ways that you deliver those services, the people you have on your team, firm assets, and more. Be realistic, though, and always think about

it from the client's perspective. Give the most focus to the strengths your competitors don't have or, even better, can't get.

Weaknesses

This is the part of the process where the cat tends to get your tongue. People don't like to think they have weaknesses, and those who run accounting firms are no different. You also need to decide up front that all participants must resist having their feelings hurt and agree that this is a time for open and honest dialogue. What could you do better? What have you been criticized for or received complaints about? Where are you the most vulnerable, and what causes that vulnerability? Don't tiptoe around this part. Think about it in a way that is constructive and positive. Look at your firm the way an outsider might; you may even want to get input from a few trusted advisors or long-term clients. It might not be fun, but uncovering your weaknesses is one of the most productive things you can do. If you don't know where you are weak, you can't strengthen those areas.

Opportunities

Now we move on to external factors and get to list out the opportunities your firm has. Are there emerging trends on which you can capitalize? Are there areas where you can expand or change your service offering to better address client needs? Is there a way you can package two or more services together to upsell your current clients and appeal to prospects? Are there areas where you can provide services that you simply haven't been able to address or expand to yet? Look for changes in the industries you serve, technological changes, government policies, and socio-economic and demographic changes. Often, key opportunities may come from unlikely and seemingly unrelated sources.

Threats

Now that you are in the glow of all the opportunities you listed out, moving on to threats can be a bit of a buzz kill. But it must be done. Are any of your weaknesses likely to make your firm critically vulnerable? What external roadblocks exist that block your progress? Are your competitors doing something different and compelling? Is there significant change coming in your industry or those you serve? Is technology dramatically changing in your industry (the answer here is "yes") impacting how accounting services are delivered? Are economic conditions affecting your financial viability? Keep an open mind and expansive perspective. Back in the day, the buggy whip manufacturing association probably didn't see automobiles as a threat, but they certainly were!

Whew! That was probably a difficult task, but the information should be enlightening. The goal of this exercise is first to paint a realistic picture of your firm and now look for ways to build on your **strengths** to minimize your **weaknesses** and take advantage of **opportunities** that you may not have realized you have, while at the same time overcoming the **threats** that you can address. See how we did that? Now you can create your own by using exhibit 2-2!

Exhibit 2-2: SWOT Analysis

Strengths	**Weaknesses**
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Opportunities	**Threats**
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OBJECTIVES

Look what amazing things you have uncovered and learned about your firm (and probably your partners too). You should now have an even clearer picture of who you are as a firm and where you need to go. So let's talk about why we started this whole process in the first place. What are your objectives? Do you want to grow your revenue by a certain percentage? Do you want to see a particular service offering or industry niche grow more than others? Do you want to add 20 new clients in the next year? Do you want to increase awareness of your firm or a particularly remarkable partner? Would you like to expand the average

revenue you receive from clients by increasing the services you provide to them? Would you like to get quoted in the press more or improve the placement of your firm in a Google search?

Again, honesty is important here. Some of your objectives should definitely be measurable, like an increase in revenue or number of new clients. Some might be softer and even ego-driven, like more awareness in a particular market or speaking engagements for a vivacious partner. Whatever they are, list them out and discuss them as a firm. You may want to identify the priority of each, marking some with a 1 for super important, 2 for those that are less urgent but still critical, and 3 for things you'd like to have once the more consequential objectives have been met. Be realistic and a bit aggressive here. You may not meet all of your objectives, but you still want to be clear about your goals. Try your best to come to a consensus on the top ones because this is how your efforts will be measured and is the foundation on which your tactics will be determined.

TACTICS

Now for the fun part. At this point, you should be able to state who you are and what you want to accomplish. So what tactics will you use to get there? The rest of this book will be spent discussing mostly online tactics (this is a digital marketing guide, after all). But also consider the more traditional marketing techniques. Not everyone likes to receive their information online, so it pays to deliver your message in a variety of ways. Don't neglect things like print materials (brochures, stationery, and business cards), direct mail, traditional public relations, and even promotional items and tchotchkes to give away to clients and at events. A true marketing plan will encompass every way in which you promote your firm, not just the online methods, even though that is the focus of this book. Here's a partial list of tactics you should consider:

- Client satisfaction and opportunity research
- Branded materials
- Public relations
- Media advertising
- Website
- Information resources
- Direct marketing, newsletters, and e-blasts
- Event marketing and seminars
- Industry conferences and meetings
- Promotional items
- Social media

Your firm may not need to have all of these things in its plan, so don't get overwhelmed. Ultimately you need to consider what your clients are most likely to see and respond to. If you are targeting senior citizens, Twitter might not be the best place for you to spend your time and money. You get the picture.

Now It's Your Turn

Creating a plan for your firm may not be an easy process, and it might require some honest dialog between partners who disagree. In most cases, it pays to carve out a day or so to go through this process (often off site) and have a third party facilitate it. Someone from outside of the firm can ask the hard questions and keep the conversation focused. The facilitator won't be as worried about hurt feelings and can follow up on good points with targeted questions that really get to the bottom of the matter. But regardless of how you choose to make it happen, just make sure you do. The value that this process and the resulting strategic plan will bring to your firm can't be overstated.

Interview: Craig Thomson, CPA, Thomson & Company CPAs

Craig created Thomson & Company in 1997 in the greater Phoenix area and experienced relatively steady growth over the years. After the recession, he realized that revenues were not increasing as they had previously, and he decided to look into what he could do to get them back on track.

What made you decide that it was time for a marketing plan?

It was several reasons. Work volume had been flat for a while, and I wanted to increase our firm revenue. I was also having a hard time recruiting new employees. I was surprised to learn that one of the reasons was that my website was poor at best. I knew it needed to evolve from a canned online brochure to a functional marketing piece for the firm. Finally, I just wanted to have a bigger presence in our market. I didn't want to be the same old firm as the guy down the street; I wanted to make sure others knew that we had something special going on.

What was the most surprising or compelling thing you uncovered during the process?

The plan really helped us identify our differentiators and decide to put much more emphasis on our special knowledge of the agricultural industry. It also created a way to show off our firm. Once we started

(Continued)

implementing it, I received so many compliments on the new branding, website, business cards, and brochure. We were finally showing ourselves off in the way we wanted. I was frankly surprised that people cared what we did, but I found that once you communicate a consistent message, people pay attention.

What was the biggest benefit of going through this process?

Prior to creating and implementing our marketing plan, I had been struggling to hire a tax manager. Once we had clear and positive identity, I was able to appeal to the type of person I wanted. The person I hired said she had not been looking for a change, but when she went to our website, she was immediately impressed and decided to interview. That was my immediate, obvious benefit: I could finally hire exactly the person I needed.

Recently, we realized another big benefit. Frost PLLC was looking to expand its presence and was looking for smaller firms that had a food or agriculture focus. When they found our website, it wasn't the same old thing as most other firms our size have; it clearly communicated who we were, what we do, and even a bit about our culture. One thing led to another, and in October 2014 we merged.

How did your firm change or grow once you had a plan to follow?

Once I was finally able to hire the right tax manager, we could expand services. And when referral sources saw our expanded capacity, they started to refer business to us. Ultimately, we almost doubled in size in four years.

What advice do you have for other firms who want to know but aren't yet sure about increasing their marketing presence and creating a plan?

Look at your goals first. If you want to grow, add good clients and hire quality personnel, you need to have a presence that shows who you are and clearly demonstrates why they should work with you over others. If your presence is outdated and your logo looks like an accountant created it, it's time to make some changes. I suggest getting help from professionals too. We may be great with numbers, but most accountants are not great with marketing. I strongly believe that creating and implementing our marketing plan was integral to the merger that just happened. Without our professional image and unique positioning, we would just look like some other firm out in the desert.

Chapter 3
Your New Front Door: Your Website

It used to be that clients learned about your firm by visiting your office, so having a professional-looking space was important. Today hundreds if not thousands more people will visit your website. However, many firms aren't making a good impression on these potential clients.

The New Front Door

Many years ago, I needed the services of a business attorney. This was a serious matter for me; I was having a dispute with a (now former) business partner, and the financial stakes were relatively high. At the time, I had never hired legal counsel and didn't know what to expect, but I asked for recommendations and was referred to a gentleman we'll call Mr. Smith.

When I went to his office for an initial meeting to see if he was right for the job, the first thing I noticed was the lingering scent of stale cigarette smoke. I waited awkwardly in the lobby until a rather unfriendly and unkempt intern appeared, telling me brusquely to sit down and wait. Having done so, I then amused myself in an ancient dusty chair by perusing an assortment of news magazines . . . published many years earlier. The fun of nostalgic reminiscence in these antiquated articles had worn off long before Mr. Smith finally appeared 30 minutes later. He came shuffling into the waiting room, rumpled and dirty, wearing ragged

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clothing and smoking a cigarette, which he used to gesture me into his office. I was not encouraged.

Needless to say, I didn't hire Mr. Smith. I later learned that I probably should have because it seems he's an amazing litigator with an incredible record of success. But the impression he made was not one that instilled even a shred of confidence in me; because of that, I had to move on. He could obviously have had a client list a mile long given his skill and success rate. But even if you're the best in the business, your appeal to clients is minimal if you can't drive traffic to your door and then make a positive impression with what they see when they get there.

Accounting marketing may have gotten a slow start, but in today's client-driven business climate, almost everyone agrees that effective marketing is an important key to success, like it or not. So you market. Choosing from among the plentiful options like print, radio, e-books, video, billboards, direct mail, social media, and all the other channels you have at your disposal, you expend limited firm resources and energy in an effort to get your name and reputation in front of potential clients. All with the goal of . . . what? Driving traffic to your door, of course!

These days, many professionals don't even have outside offices any more, working out of homes or shared spaces to save on overhead. Coffee shops, co-working spaces, and other public or semi-public spots suffice when it's time to meet with clients; often there isn't even an actual front door left with which to make that great first impression. But that's not quite accurate. The very phrase "driving traffic to your door" illustrates just how important your website is because your firm's website *is* your new front door.

Today that all-important front door to your business is a virtual one, even if you have a brick and mortar office. And one of your very first orders of business if you want to make a good impression on current and potential clients is to ensure that your digital front door is welcoming and attractive, without a hint of Mr. Smith's office of doom.

Lacking such a site, all your other efforts to market your firm will be unable to deliver the business you want and need. After you've created that beckoning site, however, every additional marketing strategy you employ will work to feed your firm's greater success.

That's because the final stop before a buying decision is the company website, nearly every time. Whether a site visit is the first and only step on a quest for a new service provider or whether it comes at the end of extensive research to find reviews and recommendations, if the brand is familiar or not, potential clients will

"The final stop before a buying decision is the company website, nearly every time."

come to your site from every direction. It is the Grand Central Station of your entire marketing strategy. Consider these scenarios:

- If your emphasis is on social media, you'll be striving for good relations with current and potential clients who will turn to your website to find the information they need before pursuing new or additional services.
- If you opt for push techniques like billboard space, radio time, or direct mail, you'll gain significant brand exposure, which will send potential clients flocking to your website to read more and check for a good fit prior to reaching out in person.
- If you prefer to rely on extremely satisfied clients to create word-of-mouth referrals and online reviews that bring new work, letting your outstanding skill, value, and customer service speak for themselves, those referred will head to your website to learn more about the fabulous firm with the stellar reputation.
- Even if your firm is simply one of many in the area that turn up in a Google search for "accounting firms," you'll be well served by a good website that communicates what your firm can do for this potential client and what differentiates you and makes you the perfect choice.

There is no way around it. Your website gives everyone who is interested in your firm the information on which they make the decision: Do I want to make an appointment with this firm? It answers the basic questions about what services you provide and for whom. Your website also conveys the more subtle details about the firm's style and creates the subjective impression on which decisions tend to rely, all other things being equal.

Do you still doubt the importance of your website because most of your business comes from word-of-mouth referrals? That may not be the case for long. "According to the Attorney Selection Research Study by The Research Intelligence Group (TRiG), 76 percent of consumers in the United States who sought an attorney in the past year used online resources at some point in their selection process, as compared to 73 percent of consumers who turned to friends and family for assistance at some point during the process. This is the first known time a study of this nature has found that online resources are on par with personal referrals for how consumers find attorneys."[1] As the attorneys go, so go the accountants, right? I bet a similar study of the CPA profession would yield similar results.

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[1] "New Study Finds Behavioral Shift in How Consumers Find Attorneys," by Amy Koyar, September 25, 2012, LexisNexis/Martindale-Hubbell Law Firm Marketing Solutions. www.lexisnexis.com/community/portal/blogs/kovarat/archive/2012/09/25/new-study-finds-behavioral-shift-in-how-consumers-find-attorneys.aspx

Some firms try to use a social media presence, such as an active Facebook page, in lieu of an actual website. Although this is an attractive idea for smaller firms with tight budgets and schedules, it's not a productive choice. Social media is an important part of any company's web presence, but it is best used to flag down and interact with clients, potential and current, while serving as a pointer to the official website. Social media is fun and dynamic, but the very fluidity that is its strength also lends an ephemeral nature that severely limits its use as your firm's main digital home. The sheer nature of social media encourages others to add their two cents to your pages, diluting your message and limiting the control you have over its focus. Your various social media pages can be compared to brightly colored tents in the sand: beckoning, promising a good time to partygoers who seek them out or stumble upon them, but always moveable. Your website, on the other hand, is your online castle; it's meant to last. Built on solid ground and added to or remodeled over the years as you see fit, this is the firm's home base for countless generations. It lends a sense of permanence in an impermanent world, and it is where the people who have found your firm through any means will turn for confirmation of their early impressions.

Explore your own experience. When you meet new contacts in a professional context, what's the first thing you do when you get back to your computer? You go to their website to learn more about them. When a friend recommends a new service provider to you, where's the first place you go to check out the details? Their website, of course. When you hear about an intriguing place or product, what do you do next? If you're like most people today, you go straight to the web in hopes of finding its site for more information. Even if you first learned about the subject through social media or an online reference or review, you'll go to the *real* source of information—the company website—to get a complete picture.

Conducting basic reconnaissance and due diligence via a business's website has become standard operating procedure, and people develop strong impressions based on what they see. It is critically important to your success that you leave all these prospects with a positive feeling about you and your services and products by making that website an information-rich interactive place that's well designed and welcoming. In the following sections, I'll discuss strategies to help you create this type of site for your accounting firm.

LET YOUR FREAK FLAG FLY

You should be convinced that you need a website by now, and I'd be willing to bet that most of you have one already. But just any old site simply will not do in this day and age. Websites have evolved rapidly over the years; gone are the days of taking your print brochure and just tossing it up online.

Admit it. That's probably exactly what your first website was: a simple replication of a print brochure. That's what nearly all websites were in the early days. In fact, quite a few firms still go this route. Others go with a template site that allows for little differentiation. Do a bit of searching, and it won't take long for you to find a firm that has nearly the same look, feel, and even content as one you saw earlier. On one level, we understand the appeal of taking this approach because it's certainly easier and a lot quicker than creating your own site. But an "Only the names have been changed to protect the innocent" approach isn't good for your brand. It not only makes you seem like a "me too" kind of firm, but it also adds to the commoditization of the industry.

What Exactly Is Our Brand?

When most professional service providers are asked, "What is branding?" they are quick to answer, "a logo." And they are partially correct; a strong logo should be the foundation of your visual brand. But it's so much more, too. Ultimately, your brand is your promise to your clients and encompasses everything you do. It includes the way your office looks, the way you answer your phone and emails, the type of people you hire, and the way you deliver your services. Ultimately it's who you are as a firm.

Therefore, you should approach your brand and logo as very important parts of your firm's identity and reputation. Your brand is often the most consistent representation of your firm, and creating one should be approached with a level of seriousness and dedication. If you haven't gone through the process of creating a strong brand for your firm, or if the one you have isn't doing the job, take care of this first! Your brand is the foundation for all you do and will determine how you talk about your firm, how your services are delivered, and, yes, also serve as the visual representation of your firm. Without it, the rest of the efforts I discuss in this book will not be nearly as effective or lasting.

Which brings me to my mantra: "What makes you different?" I'd be willing to bet every one of our clients has been asked this question at one time or another. If you've ever heard me speak at a conference, I'm sure it came up at least once or twice. It's even on the cover of our firm's brochure.

The reason for this level of focus is that identifying and embracing your differentiators is vitally important if you want to stand out from all the other firms in the industry. How many times have you heard firms tout that fact that they provide great services by hiring great people to serve great clients? So you think you are great and that fact alone is supposed

to convince me to hire you over all the other firms that also think they are great? I can't measure great, and I can't even value it in real terms, so the claim becomes virtually meaningless. After all, no firm is going to go to market claiming, "We offer the same services as our competition, hire average people, and work for mediocre clients" when in fact, that is probably true more often than some of us would like to admit.

I can hang my hat on "different" though, and so can you. Do you have special expertise in a handful of industries? Do your people have education and designations that others don't? Has your industry segment leader worked directly for the industry she now serves? Are your clients likely to find you in jeans rather than a suit when they come to your office? Does one of your partners have a leadership role in the industry or advise the IRS or AICPA? (See figure 2-1 for a guide to help you determine your firm's differentiators.)

You get the idea. Different is measurable and makes your firm stand out from the rest. It doesn't necessarily make your firm any better than your competition, but if you can clearly define your differentiators and position your firm as an expert in a particular area, you will attract new clients. So the logical conclusion here is that if people are going to your site to learn more about you and your firm, you want to make sure they walk away with a clear understanding of what makes you different and the best choice for them. If they go to your site and see nearly the same stuff as they do everywhere else, they may still reach out to you, but the likelihood of it diminishes. It will also drive them to make a decision based on price rather than value. By articulating precisely what sets you apart from the rest of their options, you are offering them a good reason to choose your firm over all the rest.

THE BUILDING BLOCKS

Not all sites are the same, nor should they be. (Differentiation strengthens your position, remember?) However, there are some common elements that tend to show up on most accounting firm sites. A few of them are listed in the following sections, but keep in mind there are no hard-and-fast rules.

Home

Every site has a home page. It's where you go first to find what you want. In the case of accounting firm sites, this is where you establish who you are so visitors can decide within a few seconds if they are in the right place. If they can't find what they need or are turned off or confused by what they see, they will go elsewhere. Today, no one lingers on a site if they can't find what they are looking for. There are tons of options, and

time is too valuable to waste on a bad website, so make sure you clearly state what you do, provide clear navigation to the rest of your content, include photos or illustrations that are appealing and representative of your firm, and brand it to look like the rest of your firm's materials.

Services

This might seem obvious, but make sure you list explicitly what you do on your website. There was a trend for a while that I still see quite often of simply saying that your firm offers "business advisory" services rather than using terms like "accounting," "tax," "audit," "bookkeeping," and the like. The main idea behind this was to expand the role the CPA played for clients and not limit the possibilities to what the average person "thinks" an accountant does. The services you provide are so much more expansive than mere tax assistance, so why shouldn't you label them something all-encompassing like "business advice" or "business consulting?" The problem with that is that someone who is looking for an accountant is never going to search online for a "business advisory consultant." The term is too broad and ambiguous. I encourage firms to expand beyond simple tax and audit services, but make sure you don't lose sight of the big picture. Describe what you do, for whom, and how you stand out from the rest, too.

Industries

If there are particular industries where you have special expertise or where you thrive, make sure you include that information on your site. Many firms are afraid to do this for fear of turning off potential clients that may not be in the listed industries. That that can happen, but most of the time you get even more new clients who are thrilled to find someone who understands their business and industry and can offer special advice and direction to them. A good web designer and writer can help your firm communicate that although you have special expertise in a few industries, you perform outstanding work for others as well. The benefits to be gained by calling out your industry expertise far outweigh the downside in the vast majority of cases.

Profiles

This is one of my favorite sections, and I am not alone. In fact, outside of the home page, partner and employee profile pages are the most visited on any professional services firm site. You can pretty much bank on potential clients going here to learn more about you, so give them something interesting to read. No matter how boring you think you are, everyone has something unique and fun to share in a bio.

Typically readers want to start out by reading about your current role and what makes you particularly valuable in that position. Then you can go into past experience, awards, professional memberships, and volunteer activities. Most people like to include a bit about their education and even go back to their childhood a bit. It allows readers to see how you got where you are today and gives them a bit of confidence in your ability to help them. But don't stop there! Here's where it starts to get really interesting. Share some personal information as well. Not "I like to drink alone in my underwear and watch a lot of reality TV" personal, but "I'm crazy about home-brewing and love coaching Little League for my grandson's team" personal. Do you love sewing and zombie movies? Perfect! Do you have family you're close to or a black belt in karate that you're proud of? What is it you prefer to do when you don't have to work? Do you still thank your lucky stars you got fired from that college job as a telemarketer, or did it help you discover what you really wanted to do? Have you always resented the color orange, hated spiders with an irrational passion, or dreamed about becoming an astronaut for your next career? This is what makes you *you*, and it makes your bio interesting to read. It also shows you are a human being, and everyone prefers working with humans they can relate to rather than generic "service providers" if given a choice. Besides, it's only polite to volunteer information like this to those whom you'll be asking for very personal details about their own lives.

Contact

Don't overlook the fact that many times people are simply going to your site to find your address to mail a package or enter it into their GPS so they know how to find your office. Make it easy for people to locate your contact information and consider including it discreetly on every page. Allow visitors to click on a map and enter their own address to get directions to your office. Include a phone number, email address, and even a form for them to fill out if they prefer that method. While you are at it, make it easy to reach out to your partners and staff as well. You take the risk of getting some spam, but don't you want all those potential clients that you are driving to your site to be able to reach out to you in the manner they prefer? Take advantage of spam control mechanisms like CAPTCHAs[2] to cut down on the clutter, but always err on the side of making it easier rather than harder to contact you and your team.

[2] CAPTCHA is an abbreviation for Completely Automated Public Turing test, and it challenges users to prove that they are human and not automated bots of some type. Most of you will know this device as the annoying combination of blurry letters and numbers that you must fill out at the bottom of many online forms.

News and Articles

Including a section like this can be a great way for you to showcase the news coverage your firm receives and share press releases as they are distributed. Not to be confused with a blog (which we'll discuss later), this section is typically populated with news *about* your firm (and potentially the industry) as opposed to articles created *by* your firm. Here's the challenge: it needs to be kept fresh and up to date. An out-of-date website where the latest news item dates from three years ago reflects poorly on you and your firm. Even six months makes your site look a bit dated. So consider how much news is written about your firm and how many releases you put out on a regular basis. If you have an active public relations initiative, go for it. Otherwise, step carefully and consider other ways of distributing this information.

Resources

I'm seeing this less and less, but this page still crops up, particularly on template sites. The original idea was to make your firm's site a true "information hub" for visitors. Although the idea isn't a bad one, it is just not likely to happen. If your clients want to go to the IRS site, they are going to Google it as opposed to going to your site, clicking on Resources, and then clicking on your link to the IRS. It doesn't hurt to have good information and links to commonly needed sites on your page, but we typically don't recommend that you pay a lot of money for this opportunity. Features like calculators, which are fairly common on older sites, are going out of vogue for the same reason. Even those of us in the industry are more likely to do an Internet search for a mortgage calculator than go to a link on our firm's site, and we know it's there. Again, it's not bad to have links and forms for your visitors to use, just don't expect a ton of traffic to this section.

Other

We are just scratching the surface here; the options for your site are endless. Recently, we are seeing sites take great advantage of things like client portals and campaign-specific landing pages. Regularly adding new case studies that illustrate your work with individual clients by telling a story is an excellent way to update your firm's online presence. Some sites even offer an option to instant message with an expert. Think about the types of information your clients want to see, and if you aren't sure what those are, ask the clients. You will be surprised how much you can learn by a quick conversation with a handful of clients.

TIPS TO TURBO CHARGE YOUR WEBSITE

You have decided what you need and have figured out the pages you want to include on your new site. I've found that getting this on paper helps ensure a smoother process.

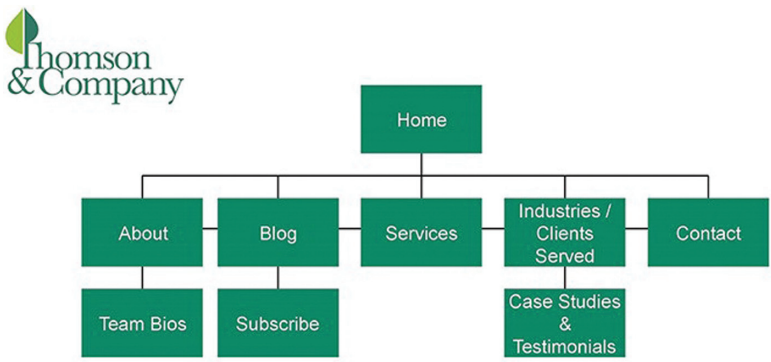
Create a Site Map

The first step in the website process is to create a site map. Don't make this exercise overly complicated; most site maps can be built easily using common programs like PowerPoint or even Word or Excel. It simply needs to show the pages that your site will contain and how they will be organized once they are built. I recommend that you include a brief explanation of what each page will contain as well, either below the map or on a separate page. This gives you a visual of the site that you can share with partners, marketing services providers, and other interested parties.

Figure 3-1 provides an example of a fairly simple site map for reference.

What's next? The following paragraphs are a few rules and even more tips to help you get the most from your efforts.

Figure 3-1: Sample Site Map



- **Home**: Clean, simple introduction copy completely from the client perspective.
- **About:** Simple information about your firm, a tiny bit of history and your philosophy
  - **Bios**: Professional bios. We will also want to add some fun information, v-cards, LinkedIn links and a professional head shot for each.
- **Blog:** Regularly updated information that is useful to your current and potential clients. Can also include posts on local topics that aren't accounting focused. For example, local events and happenings.
- **Industries/Clients Served:** Lists and details industries served, focusing on agriculture. Include area with links to client testimonials and case studies.
- **Services**: Lists and details services offered

Notes: We've not included any areas for the excessive links/resources that are currently supplied by your web host. If there are specific items you'd like to keep for your clients, let us know and we can add those in, but as a whole, we recommend doing away with all that needless content.

Update Regularly

Back in the day when you flung your printed brochure up online, most firms went months and even years without making a single update to their sites. Personnel changes were usually the only reason edits were made, and those had to be done by whomever it was that built the site in the first place. Those days have gone the way of crimped hair and Beanie Babies. Today it's important to update your site regularly to give visitors a reason to come back. It also impacts your search engine placement because new information is one of the things that pushes sites higher in rankings. Finally, it's expected. Whether it's your social media feeds, the latest blog post, or simply adding a few of the latest tax tips, regular updates to your site will lead to more traffic and longer visits. See exhibit 3-1 for a list of questions and common updates.

Exhibit 3-1: Website Review Checklist

You should routinely review your website to ensure its accuracy and effectiveness as your firm grows and evolves. How frequently you update it will be determined by the rate of change within your firm, but at a minimum review it quarterly and ideally once a month.

We have listed some things below to help you get started, but we encourage you to adjust and add to this list so it meets your individual firm's needs.

Overall

- Look for specific mentions of dates that need to be adjusted.
- Make sure images on website are current.
- If there are images that contain staff members no longer employed at firm, make a decision if those will stay on the site or if they need to be removed.
- Test all links throughout the site to make sure they still work.
- Test any intake forms to make sure they go where they are supposed to and don't get caught in spam filters.
- If using additional widgets or apps within website, make sure they are functioning and up to date.
- If you've added social media to your marketing mix, make sure links to these profiles are listed on your website and in working order.

Bios

- Remove bios of staff members who are no longer with firm.
- Add any new bios.

(continued)

Exhibit 3-1: Website Review Checklist—*(continued)*

- Look for mentions of duration that need to be adjusted. For example: "Sandra has 25 years' experience in international tax." Does she now have 26?
- Add new certifications, organizations, memberships, and awards as appropriate.
- Adjust lists of skills or focus as necessary.
- Review headshots to make sure they are fairly current.

Services

- Add in any new services.
- Update existing services if anything has changed.
- Update key words and phrases based on current search engine optimization (SEO) strategy and target market.
- Review and update the person listed as the primary contact for each service.

Industries

- Add in any new industries your firm is now targeting.
- Update existing industry pages if anything has changed with your firm or in the industry as a whole.
- Update key words and phrases based on current SEO strategy and target market.
- Review and update the person listed as the primary contact for each industry.

Blog

- Review the blog to make sure it is current and there hasn't been too much of a time lapse since last post.
- Check that the subjects aren't getting too stale (for example, too much of one service or industry is represented or too much technical information and not enough firm culture).
- Review comments and make sure legit ones are getting through and are being responded to. This should be done daily or at least weekly to ensure those taking the time to make a comment get a response.

Contact

- Make sure all numbers and emails that are listed are current and functioning.
- Check that any intake forms are working properly.
- If you have directions, make sure they are still current, especially if there is construction taking place or there are detours.

Maintain Some Control

The previous section leads directly to this important point: insist that your site be built in a way that allows you or someone at your firm to make updates to it easily. Back in the day, sites were all built in HTML, which was difficult at best for the layperson to use. Now there are many options for content management systems (CMS) and nearly no reason to use pure HTML anymore. A CMS is an online program that allows multiple users the ability to add, edit, delete, and update website content from a central interface. In most cases, you can log-in to the "back-end" of the site and make changes relatively easily and make them live in one click. I'm a firm believer that someone inside the firm should be able to make updates to the content of the site without calling an outside expert to help. It takes very little training to learn how to use Wordpress, Joomla, or other similar systems, and the money you can save is substantial. You will likely want to go back to your site developer when you need to add entirely new sections or update the overall design of the site, but simple content updates can be handled easily in house by most firms, assuming your website relies on the right platform. Therefore, it is important to mention that you want this flexibility when hiring a marketing firm to create your site. And if they say it's not possible, it's time to move on and find a different firm that will build the site you want.

Write Dynamic Content

Writing for the web is quite different than writing for other mediums, and it has evolved over the years. Think about how you "read" a website. If you are like most people, you have a tendency to read the headlines then scan the copy for the information you want. It's pretty rare that people actually read a website like they would a book or even a brochure. Keeping this in mind, it is important to make sure you write using subheads, callouts, and bullets to break the content up and give visitors a way to quickly find what they are looking for on the page. Content should be active, not passive, and written with a confident air. Saying things like "we believe that . . ." and "we think you should . . ." makes the reader think you aren't sure about what you are saying. Remember, the people visiting your site are looking for someone to help them with something they likely don't fully understand. Softening your language doesn't do you any favors and can make the reader question how well you know your stuff.

Another thing to consider is who should write your site's content. In most cases, the CPAs in your firm aren't the best choice, as much as we hate to say it. Although they may be great writers in their field, the type of writing an accountant does on a regular basis in no way resembles the copy that should reside on your website. It is certainly important to get

their input and advice as the copy is being developed, but their time is typically better spent on billable client work than on trying to craft compelling web copy. We recommend hiring a writer who understands how to write for the web and also understands your industry. This may cost a bit more up front, but ultimately it will take much less time and require fewer rounds of edits.

A common trap that many accounting firms fall into is making the content all about the firm. "But it's our website!" you might respond? Yes, and of course you need to talk about what you do and those you serve. But the more you can phrase your communications from the reader's perspective, and the more specifically, the more powerful your message will be and the longer your visitors will stay on your site. For example, compare these sentences: "We provide tax services for the manufacturing industry," versus "Manufacturers depend on us to reduce their tax burden and help them take advantage of available tax credits." The basic information is the same, but the second sentence starts with the industry you are talking about and goes into more detail about how a manufacturer might benefit from the services you offer. The second sentence paints a vivid picture of value and offers a more powerful impetus for the reader to learn more. Do your best to avoid just touting your accomplishments and bragging about your awards. Focus on potential clients, and give them content that they can relate to and that allows them to picture themselves working with you.

Finally, and I can't stress this enough, hire a proofreader! Even the best writers in the world make errors and overlook blatant mistakes. Always insist on having someone who has not been involved in writing the copy check it for mistakes and also for flow and clarity. People make judgments about your intelligence and attention to detail, fair or not, based on how many typos and mistakes they find on your site. Don't give them a silly excuse to go to your competitor. The time and money spent on having your site proofread will pay off in spades.

Keep Navigation Simple

Have you ever been to a site where you can't immediately find the navigation? Or have you seen one where the navigation is written to come across as clever rather than directional? How long did you stay before finding another option? Your site's navigation should always be easy to identify and clearly indicate what visitors are going to find when they click on each button. You don't have to use the same terms as every other site out there, but stick with obvious words or phrases. I've seen some sites start to get a bit too slick with their design, opting for unidentified colorful buttons for navigation where the location doesn't show up until you hover over the dot. Don't go there! Make it easy to maneuver through your site, and visitors will appreciate it. A visitor who

feels competent and successful is far more likely to follow up with personal contact than one who becomes frustrated and feels inadequate even to cope with the website.

Don't fall into the trap of trying to make every page of your site available with one click and cluttering your site with too many navigation options. Take advantage of features like dropdown menus and roll-over hyperlinks that change color to indicate a link. Also make sure that your navigation stays in the same place on every page of your site. If you have a bar at the top of the page, keep that same bar throughout all pages on your site. Don't make visitors search for your navigation each time they want to see a new page. You will quickly frustrate them and force them to move on to a competitor's site.

Please the Eye

Content may be king, but your site's design is certainly an equally powerful queen. Remember what we said earlier: people are making judgments about your firm, its professionalism, and its culture based on the look and feel of your site. Is your firm more of a buttoned-up, navy blue suit type? If so, it should communicate that and look somewhat formal and professional. Do you have a more casual atmosphere and a strong commitment to your local community? Those who visit your site should get that impression.

Ensuring consistent branding among your office environment, printed materials, website, social media, and even the way you greet and treat clients is important. You want anyone who visits your site to realize at a glance that it is YOUR site. It should capture your culture and even feel familiar to those who know your firm.

Which brings me to stock photography. We use stock photography quite often but are very persnickety about the images we choose. Stock images can be useful when used appropriately and in moderation, but most people would much rather see photos of your real employees than a group of perfectly diverse 20-something models shaking hands and pointing to random objects off frame. Although your real people may not be quite as pretty as those stock models, you can be sure they won't show up on other sites either. I recently visited two competing firms' sites and saw exactly the same photo on their About pages. Talk about failing at differentiation! Stock photos can help you visually communicate a message in a beautiful way, but use them sparingly. You may also want to visit a number of stock sites to find the types of images that would be the best fit for your firm's brand.

Stock photography is a lot like shoes: you can get amazing quality and style, but you'll pay more for it. You can get comfort and simplicity for less money, and you can get what everyone else is wearing for next to

nothing. Here are my thoughts on selecting a stock photography provider:

Provider	Pros and Cons	Website
Getty	Getty is one of the best. It has an amazing selection and will sell you exclusive rights but tends to be expensive. It does offer a limited selection of free images, though they have restrictions, so do your research.	www.gettyimages.com
Corbis	Corbis is a close second to Getty. It is a bit less expensive but still not cheap.	www.corbisimages.com
Shutterstock	Shutterstock is great for vectors, icons, and clip art and is relatively inexpensive. However, it is madly popular, so images are likely to show up elsewhere, too.	www.shutterstock.com
Istock Dollar Photo BigStock	IStock, Dollar Photo, and BigStock are some of the better cheap photo sites. They have pretty good selections, but, again, you are likely to see their stuff used in other places.	www.istockphoto.com www.dollarphotoclub.com www.bigstockphoto.com
Free Images	Selection is very limited, but what do you expect for free?	www.freeimages.com http://morguefile.com

You may pay more for each image with providers like Getty and Corbis, but it is well worth it to have an image that isn't likely also to show up on a billboard for potato chips, an ad for erectile dysfunction medication, and your competitor's brochure.

Be Mobile Friendly

More and more people are getting their information on the go. Just look around any restaurant or bus stop and you'll see a very large percentage of people glued to their smart phones. And admit it: you've been guilty of doing the "blackberry prayer" during a meeting or two. Because of this, it's important that your site be mobile friendly. If during the course of a business lunch someone refers others to your site, and they decide to bring it up right then and there, will they be able to easily navigate on even the smallest of touch screens? Your website should be developed in such a way that it can adapt to the different types of mobile devices in common use. Typically, when people are searching on a smart phone, they're looking for an email, phone number, or street address. These should be easily accessible from the very first screen. If you're not sure

how your site appears to the average mobile user, try pulling up the site on your own device or testing your URL on a site like www.mobiletest.me to get a better idea of how people see your site when they are on the move.

As you can see, there are quite a few pieces involved in building a website. But that's how it should be. Your services aren't overly simplistic and mundane. They're multifaceted and dynamic, and your website should express that. By creating a website that speaks to your culture and differentiators, you set yourself apart from the competition by showing that you are more than just any old CPA firm. See the following checklist for a summary of this chapter's main points about website building.

Website Building Checklist

- ☐ *Create a website*. If you haven't already, you really should create that website. It's a must!
- ☐ *Clearly define your message*. People should know what you do and whom you serve from the very first page.
- ☐ *Don't use a "one-size-fits-all" template*. Create your own site instead of just dropping your name and logo into a prefab site.
- ☐ *Homepage and navigation*. Establish your brand immediately and have clear navigation for quick and easy access to all information.
- ☐ *Services and industries copy*. Describe what you do, all you do, succinctly. Don't just use buzzwords and phrases. Define the industries where you excel and plant a flag in those niche areas. And speak to the client's experience and needs; don't just make it about how wonderful you are.
- ☐ *Partner and staff profiles*. Don't just include your professional history. Add in items like hobbies and extra-curricular activities—don't be afraid to show some personality.
- ☐ *Contact page*. Include all methods of contact and make it easy to find this information. Even consider adding staff emails on profile pages.
- ☐ *News, articles, and resources*. Only incorporate these items if you are able to update them routinely.
- ☐ *Update your content regularly*. Fresh content helps you look current and in the know and is great for search engine optimization.

(Continued)

- ☐ *Control your website*. Have your website designed so you can update it internally when needed versus relying on an outside vendor that may not always be responsive when you need it.
- ☐ *Make it pretty*. Make it professional but also convey your culture and your style. Be cognizant of the photography you use, opting to use images of your actual office and staff whenever possible.
- ☐ *Be mobile-friendly*. Make sure your website is adaptable to those researching you via mobile devices.

Interview: Tracy Tavares, Marketing and Practice Growth Senior Manager, LGC+D

In 2013, Tracy Tavares spearheaded the complete redesign of LGC+D's website. They wanted to create a client-focused site that was more consistent with their dynamic team of professionals. Tracy decided to contact a professional services marketing team who could help her create the new site and bring their brand into the 21st century.

Why was it important to you to update your website?

Our old website didn't reflect our image any longer. It had far too much text and was full of stock photos. In addition, it was static rather than dynamic. It didn't allow for any interaction, and there was no blog or social aspect whatsoever.

What do you like best about your new site compared with other websites or your previous one?

The look is far superior; our clients and friends of the firm continue to comment on how much of an improvement it is. It's easy to navigate, and the language focuses on the client. Our old site was very "chest thumpy," saying we are the best at everything we do, whereas the new site focuses on the challenges clients face in their specific industries and how we can help them solve these problems. It's a huge improvement.

What has been the biggest benefit of having a more modern website? What was most important to you from the beginning?

Recruiting. Our current clients are probably not visiting our site often, unless for some reason we are directing them there through a newsletter or other marketing initiative (and now that we have the new site, we aren't reluctant to do this sort of thing). But the number one group visiting our site on a regular basis is college students and young

professionals looking for jobs. Our new site portrays us in a much better light. We even look "cool!" It makes a very good first impression on those considering employment at the firm. From the beginning we wanted a less text-focused site that was more modern and easy to navigate—and we don't mind looking cool either.

Why is it important to express your differentiators on your website?

Every accounting firm site says it's the best at auditing, tax planning, you name it. That has caused our industry to become commoditized. So first we had to determine what our differentiator was. After two years of working with Gale Crosley, a top 25 accounting consultant, she was adamant that our set of incredibly strong client relationships was our differentiator. Having worked with hundreds of firms, she observed that we were closer to our clients than most firms she's worked with. Because we have a large number of clients who've been with the firm for more than 40 years, we decided to make the theme of "client for life" front and center. We featured well-known professionals in our geographic area that have been long-term clients of the firm and asked them to "tell our story" for us.

What do you want people to take away from your website?

When you work with our firm, you are building a professional and personal relationship with your service providers. We'll do what it takes to add value beyond the financials. And it's a cool place to work.

When updating your website, how did you envision it playing into your overall marketing strategy?

Our strategy for the last several years has been practice growth through niching or segment experts and highlighting our many industry segments. The site has helped to make this a reality because we are easily able to link any thought leadership pieces to our segment web pages. The new site is fantastic as the online home of the firm, showing us in our best light and acting as a recruiting tool, and it also allows us to feature current industry contributions by our team members. The interactive nature of the site helps build and maintain active relationships as well.

How did you decide what content to include on your website?

We didn't want to clutter the site but instead let it talk directly to our recruits, prospects, and clients. We've done this through specific niche pages and a robust section dedicated to recruiting and firm activities. In addition, having our marketing firm interview all of our niche leaders was priceless. It allowed us to get the message out in one tone versus

(Continued)

the leaders writing their own copy about how great they and their services are.

Your website is visually striking. How important was the look of your site in your overall goals?

It was VERY important to us; we did not want to look like just another accounting firm. The feedback has been tremendous, and people have commented about exactly this point: "It's so different than any other firm site I've visited!"

How was the process of getting partner buy-in for a new site and the expense that incurred?

Not hard. Luckily I had the Managing Partner behind me. Because we did our due diligence and interviewed many firms, it was easy to sell the idea once we'd decided what we wanted and who could best deliver that for us.

What has been the response of those inside the firm to your new site?

Very positive—especially by those who do use it as a marketing tool (some don't and never will). Our associates and seniors view it especially favorably.

What advice would you give to others looking to undertake the same process?

1. Don't believe anyone who tells you this will be a full time job and that you have to drop everything for the next year.
2. Don't let everyone weigh in on the content or look. Get two or three firm leaders in your corner, and as long as you are making them happy, it works.
3. Work with a marketing or web firm that understands your industry. That made ALL the difference.

CHAPTER 4
Give to Get: The Power of Thought Leadership

Marketing for accounting services is significantly different and more difficult than selling shoes, crayons, or cars. What you do professionally is complicated and not well understood by many of your target clients. Most can't go behind you to check that you are taking advantage of every tax-savings opportunity or ensure that you have dotted all the i's and crossed all the t's in an audit. They have to trust that you know what you are doing and are looking out for their best interests. What you do can't be touched, and they can't really take your services for a test drive to see how you do. To top it all off, you probably charge a good deal of money for your work, and I've never seen a firm offer a money-back guarantee.

When you take all of this and many other factors into account, your clients are really buying your experience and expertise. They have to risk a great deal of trust that you will do what is needed and best for their specific circumstances. How do you prove that you have the skills to meet their needs? One highly effective way is to be a thought leader.

"Thought leadership" is a phrase that gets tossed around quite a lot these days, and it means different things to different people. One of the best definitions I have found comes from *Forbes* magazine:

Take Your Marketing Online!: Proven Ways to Grow your Firm in the Digital Age, 2nd Edition. Bonnie Buol Ruszczyk, Kelly Lucas and Sarah Warlick.

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> A thought leader is an individual or firm that prospects, clients, referral sources, intermediaries and even competitors recognize as one of the foremost authorities in selected areas of specialization, resulting in its being the go-to individual or organization for said expertise. A thought leader is (also) an individual or firm that significantly profits from being recognized as such.[1]

Using this definition, the first thing to note is that as a true thought leader, *everyone* recognizes and accepts that you are an expert in a particular area. That doesn't come overnight. Secondly, you are an expert in *selected areas of specialization* and, in most cases, one area. No one is a thought leader in "accounting." The area of expertise has to be narrow and specific. In fact, the more precise it is, the more likely you are to be recognized for your knowledge and rise to the level of a thought leader. Next is the fact that this expertise leads to you being the *go-to individual or organization for said expertise*. So you aren't just smart for the sake of being smart. This prowess leads to business! Finally, as a thought leader, you should *significantly profit from being recognized as such.* Most of the time, real thought leaders can charge significantly higher rates than average and be more discerning about the work they accept.

So you can make more money, do work you enjoy for people you like and be recognized—and even famous—as a thought leader? Holy cow! Why isn't everyone doing this? It's because it's not easy and takes time and consistency. There's no magic pill you can take to wake up to the sound of reporters ringing your phone begging for your opinion on the latest tax-law changes. Most thought leaders spend years writing, speaking, sharing information, and staying up to date on their area of specialization. Don't think it's impossible for you, though, or that it's too late to get started. You don't need to be a thought leader on the national stage to see amazing results. Most CPAs benefit greatly by focusing on their local markets or on the very specific industry niche that they serve. You can see results from your efforts if you are consistent and committed to doing the work that is required.

In 2003, long before people were tossing around the phrase "thought leadership" like a hacky sack at a music festival, I was struck by the first example of thought leadership that I saw from someone I knew. A colleague who owned a public relations firm in New York City wrote a book that shared nearly every secret and tactic used by PR professionals. He basically laid out how to write press releases, how to identify the right publications or outlets for your story, how to reach out to reporters, and how to get coverage for your product or service. The book could

[1] www.forbes.com/sites/russprince/2012/03/16/what-is-a-thought-leader/

have easily been used as a textbook for college PR courses and caused quite a stir in the industry. PR professionals (and some who weren't so professional) were steaming mad. They viewed this as a personal affront; it was as if the author had revealed how the magic tricks were executed. Some even said that their industry might dry up. All hyperbole aside, it was a pretty unusual and gutsy move on his part. After all, why would anyone hire him when they could just read his book? So I asked why he did it. Over a decade later, his response still sticks with me as I observe so many others following in his footsteps. He stated that he knew that some people would read his book and use the tips it contained without ever turning to a professional for assistance again. But he expected that the majority would read it and realize that a lot more goes into your average PR campaign than most people realize. If they already worked with a PR professional, they would probably appreciate his or her efforts more and possibly complain less about paying for them. Others would realize that they didn't have the necessary time or relationships needed to effectively promote their products and services in the way they wanted to and decide to hire someone to help. Those were the readers he really wanted to reach because who would they rather call than the *person who literally wrote the book* on how to do PR? And it worked. His firm grew, and his role as a thought leader was cemented.

But wait. This is a digital marketing book, so what does being a thought leader have to do with the book's primary subject? More than you'd think. A couple decades ago, thought leadership was held only by those who had the capacity to travel and speak in front of a live audience or write an article for a well-respected print publication and pitch it. Nowadays, everything is moving online, including periodicals, seminars, and conferences. People want the convenience of being educated without having to step out of the office and battle traffic. Magazines and newspapers have moved online, educational seminars have morphed into webinars, and virtual conferences are making their presence known. The playing field is now leveled, making it easier than ever for those who excel in their field to be heard. You just have to make sure you're saying something worth hearing. So what do you think? Are you up for it? Are you wondering where to start so you can decide? In the rest of this chapter, we will discuss ways that you can establish your own thought leadership, regardless of the size of your firm or its reach. From staying abreast of what others are doing to writing articles, giving speeches, and more, you'll be able to create your own plan to get the recognition you want. Let's look at what is involved.

EIGHT STEPS TO BECOMING A THOUGHT LEADER

1. Define Your Area of Specialization
2. Identify the Audience You Want to Reach
3. Update Your Personal Information
4. Stay Abreast of What Is Happening in Your Area of Expertise
5. Follow Other Thought Leaders to See What They Are Doing
6. Create and Share Content
7. Become a Sought-After Speaker
8. Respond Quickly and Follow Through

1. Define Your Area of Specialization

Before you can be a thought leader, you need to determine exactly *what* you are going to be an expert in. This isn't something you can simply make up; you really do need to be an expert. And the more narrow your area of specialization, the better. For marketing in general, the more niched you are the easier it is to reach your market with your message. The same holds true here. The most respected and acknowledged thought leaders have deep and focused expertise in a clearly defined area. You may be an expert in tax, but it's unlikely that you'll be able to rise to the level of expert in an area so broad. But an expert on tax law and its effects on manufacturers in Peoria probably can. You may know all there is to know about international taxation issues, but, again, that's a rather sweeping topic. How about someone who knows inside out the tax implications for U.S. retailers who want to expand into Latin America? Now we're talking. Don't worry about being too specific as long as there is a market for what you know. The best thought leaders don't want to reach everyone. They

> "The best thought leaders don't want to reach everyone. They want to reach those who care about what the thought leaders offer and are willing to pay for that expertise."

want to reach those who care about what the thought leaders offer and are willing to pay for that expertise.

2. Identify the Audience You Want to Reach

This may seem obvious, but it's important to know the audience you are talking to before you start to speak. You don't want to reach everyone, and efforts to do so will prove futile. You want to reach those who care about what you do and are looking for someone who knows more than they do about the topic. Maybe the audience is CFOs of manufacturing firms in the Midwest, or a specific state therein, or fast food restaurant franchise owners in California. You get the idea.

Once you have identified your target audience, paint a clear profile of them. Much like we did in chapter 2 with your ideal clients, describe who these people are, what they do, where they live, and what is important to them. Figure out what publications and websites they go to for information and how they like to receive information. Do they read lengthy white papers, or do they prefer to watch videos? Do they follow industry blogs? Are you likely to find them at industry conferences or local association meetings? Don't just make assumptions here; ask around and find out the answers to these questions. This will help you create a strategy for creating valuable content (like articles, videos, and white papers) that reaches the people you want with the information they need.

3. Update Your Personal Information

Are you ready to make it real? It's time to update your bio anywhere your professional description exists: on your firm website, your LinkedIn page, and any other social media profiles. You may not want to describe yourself as a thought leader just yet—it's best to let someone else do that first—but you certainly need to tout your expertise. Describe your area of specialization thoroughly and those who benefit from it. Be confident in your language, too. If you don't believe it first, no one else will.

4. Stay Abreast of What Is Happening in Your Area of Expertise

Never stop learning. You may be an expert in a particular area, but nothing ever stands still. Make sure you identify the publications and websites that cover your niche and read them regularly. As things change or new issues arise, be one of the first to comment on what's happening

and explain the repercussions for your audience. Reach out to others who are experts in your area and get to know them so you can share information, especially if you focus on different geographic markets. Attend conferences, read books, follow blogs, and watch videos. Make sure you carve time out for this work as well, and even block that time on your calendar. It's easy to forego this for billable work, but you'll never reach your goal if you aren't consistent and alert for any new information. Ideally, you'll be one of the first ones to identify trends upon which you can comment or explain emerging challenges and how to overcome them.

5. Follow Other Thought Leaders to See What They Are Doing

We can all learn something new from time to time, and following the examples of other thought leaders is a great place for you to start. There may be others in your area of specialization to follow, but your options there are likely to be limited if your niche is narrow enough. So branch out and find leaders whose thinking you respect and begin to follow them. There may be some in accounting whom you want to get to know, but don't limit yourself. For example, if you have hobbies outside of your work, find thought leaders in those areas. Love to ski? Find out who gives the best tips and talks about the latest high-tech equipment. Do you love to cook Cajun food? Look into the experts who do this the best. You are likely to discover some new and innovative approaches that these people are using to share their expertise and reach their audiences that you can adopt in your own efforts.

6. Create and Share Content

I'm not going to spend a lot of time here because the entire next chapter focuses on this topic. Suffice it to say that you can't be a thought leader if no one knows what you think or know. It is incredibly important to share your knowledge in a variety of ways so your audience will be able to see and hear you regularly. Earlier you identified the publications and sites that your audience reads and uncovered the ways in which they like to receive their information. Now it's time to get your message out there using the media options described in detail in chapter 5 so others can find out how brilliant you are!

7. Become a Sought-After Speaker

Fear of public speaking consistently tops fear of death in poll after poll. As Jerry Seinfeld once quipped, this means that at a funeral more people would rather be in the casket than delivering the eulogy. This may seem crazy, but most people I talk to, particularly those in accounting, simply hate the idea of getting up in front of a room of people and sharing insight. Although there are plenty of other tactics you can—and should—use, I've found that speaking can be one of the most effective ways to increase awareness of you and your firm. Think of it as taking the express train rather than the local. It allows you to prove that you know what you are talking about in a room full of potential clients and referral sources. On top of that, everyone in the room knows you were asked to speak on that particular topic, over other people, *because* you are an expert. Attendees can talk to you in person, and, if you're handling the opportunity well, you can convert them into clients on the spot.

Start out by offering your services to organizations in your areas of expertise. Create a speaker profile sheet (see exhibit 4-1 for an example) that you can easily share with those looking to fill a speaking docket, and give it to others so they can share it when asked. If you are still petrified of speaking in front of a group, get professional presentation training. Ask for references from speakers you really enjoy and find someone who will help you reach a comfort level that allows you to be your best self. One-on-one or very small group training tends to be best. Many of the most popular, national training groups use a one-size-fits-all approach, and this doesn't work well for most people. With the right training, though, I promise you it can be done. I'm a prime example of this. I used to break out in hives if I had to get in front of a group of people, but I knew I had to do it. I finally booked a speech six months out and found a great presentation trainer. I worked hard on my content and eventually, inevitably, the day arrived when I had to bite the bullet. It wasn't perfect, but I didn't have a stroke on stage, set my hair on fire, or uncontrollably blurt out obscenities. Each time I did it, it got easier. Now I look forward to giving presentations, and some even say I'm good at it. I'm never going to be perfect, and my style is a bit casual, but if I can do it, so can you.

Exhibit 4-1: Speaker Profile Sheet

SPEAKER PROFILE

Bonnie Buol Ruszczyk

Bonnie Buol Ruszczyk is the founder and president of bbr marketing, a firm that provides marketing services and strategy for professional services firms. Their experienced staff understand how to help accountants, attorneys, engineers and other consultants reach their audiences and grow their firms.

"I love that what I do is creative and strategic. I get to work with a variety of different people and firms, and I have some of the most amazing clients around. I get great joy and a huge sense of accomplishment when I see my clients smile as they realize that the marketing strategy we are suggesting may be just what they need to take their firm to the next level. And as a small business owner myself, I love helping other business owners reach their goals and watch their companies thrive."

Bonnie's 20+ years of marketing experience is vast and varied, and has created a woman whose work quality is bested only by her determination to constantly better herself, her company and her craft. Named one of the Top 100 Most Influential People in 2012 and 2013 by *AccountingToday*, she is an active volunteer with a number of organizations and a regular contributor to a variety of news and industry-specific websites.

Bonnie is a dynamic speaker and an empathic leader whose audiences leave feeling entertained, understood and empowered with specifically actionable information. Some of her recent audiences have included the AICPA, the Association for Accounting Marketing, CPAmerica, AccountingToday's Growth and Profitibility Summit and various state societies. She is happy to customize a topic for your group as needed. Some of her previous presentations include:

- Content Marketing and Social Media for Professional Services Firms
- LinkedIn Benefits and Practical "How To" Information
- Making your Website a Business Development Tool
- How to Create and Implement a Marketing Plan
- Marketing 101 for CPAs and Attorneys

Testimonials

"Bonnie had fresh, insightful, interesting content, and she was a natural in front of our group."
Jennifer Birtz, Senior Manager, Habif, Arogeti & Wynne, LLP

"Bonnie's presentation was clear and insightful, and reflected her solid understanding of the culture and business development approach taken by professional services firms."
Julie Barnes, Marketing Director, Smith & Howard

Some of the tools bbr marketing delivers include:

- Marketing plans
- Brainstorming sessions
- Client research, surveys and focus groups
- Copywriting & ghostwriting
- Print collateral materials
- Logos, stationery packages, business cards, branding
- Advertising
- Websites
- Social Media training and management
- Direct mail and email campaigns
- Public relations

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Twitter: @bbrmarketing

1646 Stanwood Avenue
Atlanta, GA 30317

Steve Clements's Tips on Overcoming the Fear of Public Speaking[2]

1. Make your oral communications an extension of yourself.
    a. Never try to be someone you are not.
    b. Analyze aspects of your personality that appeal to others.
    c. Practice speaking to a professional group as though you are speaking to just one person.
    d. Increase volume and energy to suit the size of the room.
    e. Keep practicing until the "professional you" and the "personal you" are the same person. The result will be less anxiety because you don't have to assume a "different you."
2. Use verbal and non-verbal approaches that capture attention.
    a. Always use body language that approaches the audience.
    b. Use hand motions that bring the audience toward you rather than away from you.
3. Know your material.
    a. It should be obvious that you have prepared for the occasion.
    b. It should not seem as though you have memorized the material or are reading it word-for-word from index cards or full pages.
4. Assess your audience.
    a. Consider all the demographics represented (age, sex, and occupation).
    b. Keep in mind what your audience is expecting from you, both in content and style.
5. Organize and direct the message appropriately.
    a. Determine how you will gain attention, develop your points, and conclude the message.
    b. Use techniques that befit the nature of the audience and are in keeping with your style of speaking.

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[2] © 2014 Executive Speak/Write, Inc. Used with permission.
I was incredibly lucky to have received public speaking training (and media training) from a friend who was one of the best in the industry, Steve Clements. For 40-plus years, he taught, trained, wrote for, and produced all aspects of performance. His expertise ranged from corporate communications to speeches and events, national network broadcasts, and a multitude of different experiences during his years as a Hollywood producer. He passed away in 2013 and is dearly missed. I use the information I learned from Steve in every speech I give, and I would like to share his best tips with you as well in the hopes that you will gain the confidence you need to get in front of a crowd and share your knowledge.

8. Respond Quickly and Follow Through

The best thought leaders are also really nice and helpful people, too. Never let your newfound notoriety go to your head. If a reporter calls you, drop what you are doing and take the call. If you are asked to write a blog post for an industry publication, do it and deliver it early so they have time for review and editing. If you are asked a question in the comment section of your blog, respond as soon as you can and continue the conversation. And if you are invited to deliver a presentation at an industry conference, accept the invitation and figure out how to make it work later. It's not always just about being the smartest or the best, but also about being responsive and following through. Be that person.

NOW GO DO IT!

You likely won't become a thought leader overnight, but it can happen if you follow the advice in this chapter and stick to it. Seek out the advice of others on this topic and follow their examples. Establish what you want to gain from the process, decide what makes the most sense for you, and do that. Whatever you do, be consistent, and you will see results.

In the next chapter, we will talk about content marketing and how you can create your own content strategy to reach the audiences you want to reach and start on the path to thought leadership.

Interview: Gale Crosley, CPA, Crosley Company

Gale Crosley, CPA, is considered the preeminent expert on accounting firm growth. She was selected one of the Most Recommended Consultants in the INSIDE Public Accounting *"Best of the Best" for the 11th consecutive year, one of the Top 100 Most Influential People in Accounting by* Accounting Today *for the 9th consecutive year, and has been named to The Advisory Board Hall of Fame. She consults with mid-market accounting firms, assisting managing partners, partners, and marketing directors, to effectively increase their firm's revenues. She guides them through development of the best strategies and tactics to achieve aggressive revenue growth objectives. You can learn more about her and her work at www.crosleycompany.com.*

How did you create your own thought leadership?

When I started my practice as a sole practitioner, I realized that if it was going to grow, I had to find a way for people to see what is in my head. There was no way I could reach people one at a time; that would take forever. What I realized, though, was that my articles could be my sales force. I didn't want to become famous or even a thought leader; I simply

had to figure out the best way to share what was in my head with as many people as possible. My goal was for a person to read something that I wrote and say, "I like the way this woman thinks." My biggest problem was that I had no thoughts to share other than how accounting firms can land big fish. I didn't think I had more than that one article in me. I had not written before, and this process was like birthing a baby—it was exhausting! Fortunately, the publication I pitched the article to had low expectations. I thought I was done. I don't know how long it was between article one and two, but now I'm on article 107, and I've got at least 20 on the drawing board. Because I had no more thoughts to share, I decided to interview people who did have thoughts and write about that. I did that for quite a while until I had my own thoughts and experiences to share.

Define "thought leadership" for me in your own words.

Thought leadership is the process of going beyond facts into a point of view. Facts are not thought leadership; sharing facts is not a value add. Thought leaders share comments, commentary, and a point of view about the facts, their implications, and perspectives. It's important to give people an idea of how and what you think about things. Saying, "I'm not allowed to give advice" is a cop-out. What I'm talking about is offering a professional, informed opinion, a point of view that is not cast in stone. Talk about trends to watch and share your opinion on where the industry may wind up due to a particular trend. Your real leadership comes from offering your readers a way to look at things that they haven't considered before because they don't know the topic like you do.

Why do you think it is important for accounting firm leaders to become thought leaders?

Because there are 700,000 or more CPAs out there, and, as far as the rest of society is concerned, we all look alike! We all took the same test. The way that you create preference and differentiate yourself is by sharing how you think about things. I'm not talking about your book knowledge, but the way you think about things and apply that knowledge; it's about your point of view and how you arrive at it. I don't want you to be clinical. I want your unique perspective. This will allow people to understand what makes you unique.

What are the first three steps toward becoming a thought leader?

1. Figure out if you can tolerate writing or not. If you can't, hire a ghostwriter or editor, or both. Many people never become thought leaders because they hate to write, but there are options. Collaborate and use ghostwriters and good editors.

(Continued)

2. Make an inventory of your thoughts. If you don't have any, interview people who do.
3. Quit saying, "I don't have time to write." Use a ghostwriter so you can talk, he or she can write, then you can work together on the final edit. It's not cheating. Writers don't have your thoughts, and you didn't go to college to write, so collaborate.

What challenges have you seen firms and partners face in their efforts toward thought leadership?

The biggest is figuring out what to write about. I like to use a brainstorming exercise where we toss out potential article titles. That way we always have something on the drawing board to write about. When I'm ready to write an article, my ghostwriter and I pull up the drawing board and pick a topic based on the title of the article.

What final advice or tips do you have for others who would like to get started on this track?

Don't worry about the fact that you don't have a place to publish the article. Write first and then worry about where it will go.

Don't be discouraged that your articles aren't running in major publications either. If *Architecture Today* isn't picking up your article, maybe a smaller, local architectural publication will. You don't have to be in marquis places. Be modest with your goals until you get really practiced at it.

Repurposing is powerful too. Take content and use it in your selling process as part of your service delivery or in your proposals. And don't forget about adding your articles to your website, blog, on social media, and in any other place you can add it.

Chapter 5
Content Marketing: Blogging and Beyond

Much like "thought leadership," the term "content marketing" gets thrown around a lot these days, yet its definition is not always clear. We know it's important to incorporate this tactic into our marketing plans and that it's somewhat different than what is considered more traditional marketing, but what is it really?

In this chapter, we'll discuss the differences between outbound and inbound marketing tactics, define content marketing, and dig into the most common methods of delivering content to your audience.

First, a Bit of History

Until relatively recently, nearly all marketing was what is now known as "one-way," "outbound," or "push" marketing. This means that you broadcast a message about your services to your audience and try to grab their attention with your efforts. Outbound marketing tactics include things like ads, direct mail, and telemarketing. The idea is to deliver your message to prospects repeatedly so they are aware of your firm and contact you if and when they need the services you offer.

Take Your Marketing Online!: Proven Ways to Grow your Firm in the Digital Age, 2nd Edition. Bonnie Buol Ruszczyk, Kelly Lucas and Sarah Warlick.

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Now, we have added a new layer called "two-way," "inbound," or "pull" marketing. This strategy attempts to deliver a message to a smaller, targeted audience at the time when they need to hear it most. It involves creating content that people will seek out so they can participate in conversations (two-way) rather than simply being bombarded by multiple messages that they may or may not care about. Common pull tactics include things like blogging, search engine optimization (SEO), and social media. Content marketing encompasses the various strategies that attempt to provide valuable information to the right audience when they need it most.

One of the best definitions I've seen for content marketing comes from a firm in the United Kingdom called Velocity: "Content marketing exploits **your unique position** in your markets to generate **valuable insight** and **advice** on **issues** your customers and prospects **care about most**."[1]

I can hear you saying, "That's an awful lot of 'marketing-y' words there. What does that really mean?" Let's break it down, and then we can go into greater detail so you can create a content marketing strategy for your own firm.

First, *content marketing exploits* ***your unique position…*** Remember all that talk about differentiators and how you need to find a narrow niche in which to become a thought leader? Here it is again. Basically, this means that you should communicate your differentiators and showcase your unique knowledge when sharing information.

… in your markets to generate ***valuable insight****…* Seems pretty clear cut, right? If the information you provide doesn't have value, what's the point? But the challenge is to keep in mind that value must be gauged by the reader or recipient of the information, not you as the content creator. You may feel something is particularly important to share, but if your audience doesn't care, it's not going to be considered valuable insight.

… and ***advice****…* This is key, and really good news too. By sheer definition, someone who offers valuable advice is an expert on that topic. If the audience considers what you write to be beneficial, or better yet, indispensable, you are well on your way to thought leader status and that much closer to nailing the concept of content marketing.

… on ***issues****…* Notice there is no mention of the services you provide or your firm's practice areas? People care about how you are going to solve their problems and address their issues. Frame your advice in a way that demonstrates how a challenge can be resolved or by sharing a story of how you were able to do this with a particular client. Whenever you can tell a story rather than talk in dry, technical terms, it is much more powerful and compelling. It also gives readers or viewers an easier path

[1] www.slideshare.net/dougkessler/the-b2b-content-marketing-workbook-3042328

to seeing themselves in the same shoes as the company or person you are describing, which is one step closer to contacting you for help.

… your customers and prospects ***care about most****.* Again, this just reinforces that it is all about the audience and not about you, the services you provide, or the firm where you work. Stay focused on their priorities, not yours. Talk about their anxieties and address their pain points. If you are trying to grow a particular service offering at your firm, for example, but your audience doesn't care or need it, your words will fall on deaf ears. If you aren't sure what they care about, ask them. Most people are more than happy to give you their opinions and share their concerns.

WHAT IS CONTENT MARKETING?

Now that we know exactly what content marketing should do, let's talk about what exactly it is. There are a plethora of delivery methods for good content, including

- blogs,
- articles,
- podcasts,
- videos,
- seminars,
- testimonials,
- executive roundtables,
- discussion forums,
- e-books,
- checklists,
- white papers,
- social media,
- how-to guides,
- case studies,
- infographics,
- webinars,
- e-newsletters,
- slide presentations, and
- FAQ and resources web pages.

As you can see, the options are nearly endless. More than anything, your choice depends on the way your audience prefers to receive information and how you can best deliver it. There is no reason to pick just one delivery method; I encourage you to try a handful of these options. I will

focus on blogging here, but keep in mind that most of the tips and advice provided apply to nearly all of the delivery methods.

DON'T JUMP IN JUST YET!

We spent all of chapter 2 talking about creating a strategic marketing plan. Well, your content marketing efforts need a plan too if you are going to succeed. Far too many people create a blog or initiate a video series without any idea of how they are going to really *do* it. Here are a few things to think about before you get in too deep:

- *Objective and purpose*. Why are you doing this in the first place? Are you trying to reach new clients, establish your thought leader status, create fodder for other marketing delivery methods, or all of the above? There are really no wrong answers here, but be clear about why you are going through the effort and what you hope to achieve from it so you can get the best results.
- *Integration with other tactics*. The best content marketing strategies don't live in a vacuum; they integrate seamlessly with all the other marketing efforts of your firm. Everything you do should support the overall firm goals, communicate a common message, and position the firm consistently.
- *Audience*. Who are you trying to reach with your content, and what do you want them to do when they find it?
- *Focus*. What will your blog, video series, or webinars be about? Are you going to talk about a variety of topics or stick to just one?
- *Creation*. Who is going to be responsible for creating the content? Will there be multiple contributors, or is one person responsible? Does it make sense to hire a ghostwriter to do the hard work while you come up with the ideas?
- *Frequency*. How often are you going to add new content? Be realistic, yet a little aggressive, with your goals. Once you decide on frequency, stick to it. Create a calendar and assign tasks far in advance so contributors have plenty of time to work it into their schedules.
- *Promotion*. Content marketing is not a case of "if you build it, they will come." You have to let your audience know it's there. So how are you going to promote your new content marketing efforts? Are you going to send out a newsletter with links to the content? Add a line to your email signature that points people to your new blog? Add a link on your site to your exciting new video series on YouTube? The methods are myriad; you just need to decide which ones you will use and get the word out. The more chances you give your contacts to find your new content, the better.

- *Management*. Regardless of how the content is created, make sure you assign someone the responsibility of "owning" the process. This "curator" can stay on top of the editorial calendar and keep the content fresh, reminding contributors of their deadlines and lighting a fire under those who need extra motivation to get started.
- *Measurement*. How will you know if it's reaching anyone if you don't have some sort of measurement in place? At a minimum, you will want to set up Google Analytics (see chapter 9 for more information) and monitor it frequently. You should also set up some sort of system to record how new clients find your firm so you can reward those who bring them in. This also helps you learn where efforts are successful and which are less effective and can therefore be cut, which will create a more efficient implementation system.
- *Definition of success*. Why are you doing all of this in the first place? When you are defining your goals, make sure you define what success looks like in measurable terms. Be realistic here, too. If you expect to create a blog and have prospects knocking down your door two days later, you are going to be sorely disappointed.

See exhibit 5-1 for a worksheet version of these questions about your firm for you to complete.

Exhibit 5-1: Content Marketing Planning Questions

Objective and purpose

Why are you doing this in the first place? Are you trying to reach new clients, establish your thought leader status, create fodder for other marketing delivery methods, or all of the above? There are really no wrong answers here, but be clear about why you are going through the effort and what you hope to achieve from it so you can get the best results.

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Integration with other tactics

The best content marketing strategies don't live in a vacuum; they integrate seamlessly with all the other marketing efforts of your firm.

(continued)

Exhibit 5-1: Content Marketing Planning Questions—*(continued)*

Everything you do should support the overall firm goals, communicate a common message, and position the firm consistently.

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Audience

Who are you trying to reach with your content, and what do you want them to do when they find it?

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Focus

What will your blog, video series, or webinars be about? Are you going to talk about a variety of topics or stick to one?

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Creation

Who is going to be responsible for creating the content? Will there be multiple contributors, or is one person responsible? Does it make sense to hire a ghostwriter to do the hard work while you come up with the ideas?

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Frequency

How often are you going to add new content? Be realistic, yet a little aggressive, with your goals. Once you decide on frequency, stick to it. Create a calendar and assign tasks far in advance so contributors have plenty of time to work it into their schedules.

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Exhibit 5-1: Content Marketing Planning Questions—*(continued)*

Promotion

Content marketing is not a case of "if you build it, they will come." You have to let your audience know it's there. So how are you going to promote your new content marketing efforts? Are you going to send out a newsletter with links to the content? Add a line to your email signature that points people to your new blog? Add a link on your site to your exciting new video series on YouTube? The methods are myriad; you just need to decide which ones you will use and get the word out. The more chances you give your contacts to find your new content, the better.

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Management

Regardless of how the content is created, make sure you assign someone the responsibility of "owning" the process. This "curator" can stay on top of the editorial calendar and keep the content fresh, reminding contributors of their deadlines and lighting a fire under those who need extra motivation to get started.

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Measurement

How will you know if it's reaching anyone if you don't have some sort of measurement in place? At a minimum, you will want to set up Google Analytics (see chapter 9 for more information) and monitor it frequently, but you should also set up some sort of system to record how new clients find your firm so you can reward those who bring the clients in. This also helps you learn where efforts are successful and which are less effective and can therefore be cut, which creates a more efficient implementation system.

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Definition of success

Why are you doing all of this in the first place? When you are defining your goals, make sure you define what success looks like in measurable

(continued)

Exhibit 5-1: Content Marketing Planning Questions—*(continued)*

terms. Be realistic here, too. If you expect to create a blog and have prospects knocking down your door two days later, you are going to be sorely disappointed.

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BLOGGING

According to Technopedia, "A business blog is a blog of published, informal online articles that are either included in a company's internal communications system (intranet) or posted on the Internet for the public to read."[2] The articles posted on blogs tend to be shorter and more casual than what you would traditionally read in a magazine or on a news site. Most of the time, blog pages are incorporated into a traditional website so visitors can view information about a firm while at the same time peruse its blog content. However, it isn't rare to find stand-alone blogs as well that point back to the company site.

Why are so many accounting firms adding a blog to their sites all of a sudden? There are a number of reasons, the first of which is that blogging is an incredibly effective way of sharing short bursts of information. It's a great way to stay abreast of the topics that interest you when you don't have time to read scholarly articles or work-related books anymore. We are bombarded by information all day, and it's hard to carve out any time to research a topic or learn about a subject that isn't absolutely critical to our jobs, particularly near filing deadlines. However, you probably can carve out five minutes to read a blog post, or even less if you skim it for the key points. Because blogs are typically written in casual, accessible language, you can easily walk away with some actionable information in a very short time.

Secondly, a blog is great for SEO. We will go into much greater detail on SEO in chapter 9, but basically it's about how well your site is ranked by search engines when someone searches for a particular set of keywords or phrases. The better your content ranks, the higher it will appear on the list of search results. It's a complicated, algorithm-driven process, much of which is kept secret by Google and the other search engines. But what we do know is that one of the things the Google "spiders" (software that

[2] www.techopedia.com/definition/1421/business-blog-b-blog

locates and indexes websites)[3] look for first is *new* content. Therefore, sites that regularly add new information are more likely to get a higher rank than those that don't make any changes, which brings us back to blog pages. Because blogs are (or should be) updated regularly, the simple addition of one can make your firm's site rise above the competition when someone enters keywords related to what you do. Because web searches are one of the key ways that people find service providers, you really want your site to be one of the first that they see when looking for information online. And if visitors come to your site and find valuable, up-to-date information on your blog, the chances of them reaching out to you increase even more.

On top of that, a blog gives you and others something quick and easy to share on social media. We'll be discussing social media in depth in the next few chapters, and you'll see why it's vital to have good information to share on these platforms. If others find it compelling, they are likely to share it on their own pages, expanding your reach exponentially. If multiple sources share it, then suddenly a blog post that may have originally reached only a handful of people could be seen by hundreds if not thousands of people. You could even go viral, which for content, unlike bronchitis, is a good thing!

Overcoming Obstacles and Making It Work for You

These are just a few of the reasons that content marketing is growing in popularity and why you should consider adding it to your marketing efforts. It's not a quick and easy fix, though. It takes continual effort and a level of consistency that many find hard to maintain. With that in mind, let's see if we can address some pretty common concerns and questions.

Generating New and Interesting Topics

"How do I come up with new and interesting topics all the time? I don't have anything interesting to say!" I can't tell you how many times I've heard this from an accountant. But you'll be surprised to find when you start putting together a list of potential topics that you really do have some great insight to share. To stoke the fire, here are a few places to start:

- *What are the top five questions your clients are asking?* A great way to get started brainstorming blog topics is to look to your clients. If you find that your clients are routinely asking certain questions, consider writing a blog post on those topics. Odds are that if several of your clients are having this conundrum, there are

[3] www.techterms.com/definition/spider

probably others seeking answers on those same issues. Be the one who provides that answer and become their go-to expert on this and related topics.

- *Look to the latest laws and regulations that affect your clients.* Anytime there are sweeping changes to rules, laws, and regulations, people run to the internet to see how the new guidelines may affect them. "How will sequestration impact me? What are the implications of the Affordable Care Act for my business?" Take a moment to help dispel rumors or clear up current miscommunications and educate your clients, as well as prospects and referral sources, in your target industries.
- *Summarize information you learned at a conference or presentation.* If you've attended a presentation or conference and gleaned some interesting tidbits, write a summary post about it. Tread carefully: you don't want to rehash everything from the presenters—they probably wouldn't appreciate that. However, it's okay to talk about a few key takeaways as long as you properly reference the presenters and link to them if possible.
- *Create a write-up about an interesting article you've read.* Blog topics need not always be original ideas. If you've read an interesting article and think your clients and prospects would enjoy learning about this same subject, blog a summary of the article or expand on the premise. When you do this, be sure you provide proper attribution to the original article with a direct link to it and add in your own two cents on the subject.
- *Is there a lesson in one of the latest news stories?* If there is a hot topic and you can relate it to the types of services you provide, blog about that hot topic. Not only will it show your ability to think strategically, but the fact that it is a hot topic can also do wonders for your SEO. If everyone is searching on that subject and your post comes up in those searches, the additional clicks and eyes on your content can only help your search engine ranking.
- *What do you currently disagree with?* Are there certain standards or concepts to which some businesses adhere that don't make sense to you? Are there current trends that you wish would just go away, and you have a valid argument to explain why? Not every blog post needs to agree with a topic or be just a basic update. Sometimes you can go against the grain when it comes to your stance on something. Create a blog post providing an intelligent, respectful disagreement on these sorts of topics. When done appropriately, these blog posts foster great discussion and show how you can think outside the box.
- *Write something just for fun.* Not all blog posts need to be super serious, and often the ones that are simply entertaining make

people want to come back for more. Blogging is a great way for you to show your personality and reinforce that you are a person as well as an accountant. Why not share an observation or write something funny about working for a CPA firm? We find that the posts we've written on our office dogs and other light-hearted topics tend to get the most comments and make people want to learn more about what we do.

This is only a start, of course. There are dozens of ways to come up with blog topics. Once you begin, you'll most likely find that ideas come to you throughout your day.

We Are CPAs, not Writers!

Point taken. Even with a treasure trove of good ideas and a realistic schedule, you don't always have the time to turn them into blog posts. I realize that this is not work for which you get paid, and client work should come first. But it's important to recognize that these efforts will hopefully bring you more client work too, so they do need to rise at least to the middle of your to-do list. Some strategies to make it a bit easier follow:

- *Divide the labor and spread the love.* You don't have to do it alone, and some of the best blogs feature multiple voices on a variety of topics. It will also allow readers to get to know others at your firm and learn about all the services you provide. The more people who are contributing, the fewer posts each person has to write. Even the most reluctant contributor can't argue with one or two posts a year, right?
- *Encourage managers and other staff to contribute.* This need not be something that only partners do. In fact, this is a wonderful way to engage your reluctant rainmakers into getting involved in business development. Writing a blog post is a lot easier than attending a networking function—at least that is the case for many accountants—so give them a chance to contribute in this manner for now. You might uncover a budding author in the process as a bonus.
- *Have partners "throw up on paper" and assign someone to edit it.* It is not uncommon to hear partners say they simply don't have the time to contribute content … and they just might be telling the truth. I'd be willing to bet, though, that they do have five minutes to jot down some notes on a topic that can then be turned into an article by someone else on your staff. Or if they prefer, have a five-minute conversation or phone call with them to get the nuggets of information that can later be crafted into a great post.

- *Hire a knowledgeable ghostwriter.* There is no shame in outsourcing some of this work to people who do it every day, either. Ghostwriters can be a wonderful alternative to having your staff do the writing. First, this is what they do for a living, so they typically know how to turn a phrase. Second, the rates they charge are most likely less than the rates that your CPAs charge, so the three hours your CPA spends on writing a post can now be spent doing client work, and the firm is better off from a revenue perspective. You do want to make sure you find someone who understands your industry and can find your "voice," so ask around for references, ask for samples, and meet with her in person before making a decision.
- *Reward those who participate.* Admittedly, this is not easy for most people at your firm, and it takes considerable effort to come up with a topic, carve out time to write, and then put together a great post. Recognize those who make the effort consistently and thank them publicly at your firm. Whether it's a dinner voucher, gift certificate, or simply a public pat on the back, it will demonstrate your appreciation for their efforts and encourage others to rise to the occasion.

Finding an Audience for New Content

We touched on this earlier. Don't be fooled into thinking that once you create the content you are done. You also need to promote it so that those who need it will find it! There are a variety of ways to do this effectively:

- *Put it on your website.* At a minimum, add a link to your blog in your firm's site navigation. Some firms actually feature the headlines from their latest posts on their home page or add links to the bio pages of the authors. Overall, just make it easy to get there when someone lands on your website.
- *Optimize the page.* Make sure you tag your posts with keywords and phrases that potential clients are likely to use. This will increase the likelihood of your page showing up near the top of the list when people use those words in a search.
- *Ask people to comment and share.* Regardless of whether you have 10, 100, or 1000 people at your firm, make sure you inform them when you add new posts and even ask them to share the posts on their own social media outlets if appropriate. The power of compound numbers works in your favor here, and your reach will expand greatly when more people share your content.
- *Post all over social media.* This is one of the best ways for you to expand your audience. Add a link to the post on your social media profiles and invite others to share. Add your own thoughts or ask

a question about the subject of the post to generate conversation. It is so easy to share and re-share via social media—you may be surprised how quickly your message will spread.

- *Feature in e-newsletter.* Many firms spend a good deal of money purchasing canned newsletter content that is exactly the same content other firms are sending out. Once your blog is up and running, you can forego, or at a minimum supplement, the canned stuff for original, home-cooked content. Your blog posts can become the articles that you include in your newsletter, which will drive readers back to your site where they can read more. Now you are on your way to thought leadership!
- *Link in email signature.* You probably send and receive hundreds of emails a day. A nice quiet way to let your colleagues know about your blog is to simply add a link to your current email signature. Not everyone will notice it, but some will, and it only takes a miniscule amount of effort to add it.
- *Guest post on other blogs.* One of the best ways to increase your reach is to offer to guest post on your colleagues' blogs. For example, if you often partner with a law firm in town, why not offer to provide a guest post for their blog on a relevant topic and offer them a spot on yours in return? You have now been exposed to all their readers and vice versa. Be careful with this tactic, though, and stick to people and firms you know. Once you grow in popularity, people will come out of the woodwork volunteering posts to glom on to your relative fame. Resist those SEO strumpets; stick to contributors you know.

ON YOUR MARK, GET SET, GO!

Content marketing is not going anywhere, and I expect it to become even more popular as technology continues to make sharing information easier and easier. In fact, as of 2014, a full 93 percent of business-to-business companies use some form of content marketing, up from 91 percent in 2013.[4] Don't let it overwhelm you; you don't have to jump in with both feet immediately. Maybe you should dip your toe in the water by adding one blog post a month for starters and then grow from there. Do what you can, but I do encourage you to take advantage of this powerful marketing tactic and see the positive results it can bring to you and your firm.

In the next chapter, we will discuss social media and its expanding role and potential reach for accounting firms and their leadership.

[4] www.slideshare.net/CMI/b2b-content-marketing-2014-benchmarks-budgets-trends-north-america-by-content-marketing-institute-and-marketingprofs

Interview: Michael Bowlan, Brown Smith Wallace LLC

Michael Bowlan is a principal and director of marketing at Brown Smith Wallace. He's been in this role for 7 and a half years, in accounting marketing for 40, and has seen a lot of change in the industry. He began his career in the context of a pre-Bates world, which severely limited the available options. At his first firm, their marketing efforts involved creating a quarterly magazine that included articles written by partners or a senior manager on a business issue of concern to corporations. The hope was that someone would read it and respond with questions because directly soliciting potential clients was still forbidden. In essence, it was an early way of using content marketing.

When and how did you start using content marketing as a strategy at your firm?

When I joined Brown Smith Wallace, it was part of my approach because I grew up doing it. We started on a more limited scale and built from there. We started creating regular content for a "pay for play" publication called *Smart Business* on a monthly basis. We would repurpose and email those same articles to our contacts. These articles featured a lot of our specialty services, and the annual collection really showed the breadth of expertise of our firm. We soon upgraded our website to further enhance our ability to push content and capture information from visitors. When the local business journal started offering sponsored content last year, we jumped on that opportunity because it meant that we would appear weekly in the online publication and our content and ads would live on the paper's online blog for the duration. This exposure is outstanding for our firm, and few readers realize that we pay for the opportunity. Then we can repurpose these articles on our website and push out through social media and emails.

What made you decide this was an area where you wanted to focus your time, energy, and the firm's resources?

It's always been a central element of the marketing mix to me. Business development folks love to have handouts or materials to nurture prospects between buying decisions. This gives them materials they can use to help with their job and nurture leads until the prospects are ready to buy.

Did your firm partners buy into the idea right away, or did it take some convincing?

They were pretty receptive overall, though some partners more than others and some tactics more than others. The firm leadership has always been open to new ideas and creative ways of differentiating ourselves. Content marketing is a great way to get your message out and helps firms demonstrate that they are top notch professionals and

provide value beyond compliance. A lot of our success has been knowing how to best use the resources we have and seizing upon opportunities as they present themselves. For example, some things are better communicated by video than print. Sometimes speed is the right response, so we pick the best method based on our goals.

When did you know it was working?

Our big moment is when we get requests from clients who want to subscribe to our content or want to read everything we put out. But the ultimate key is always whether you are bringing in business. One example involves a partner who has been around for 20 years. He has a very established network, and for a while he didn't get how marketing could help him. He finally saw the light, though. There was a CFO, someone he knew well, whom he had been trying to meet with for ages but could never get a business meeting. We sent this same CFO an article, and he quickly called our partner to set up a meeting because "now we have a reason to talk." He became a long-term client. The partner no longer saw what we did as fluff; he started to appreciate the value. What we do might not be as direct as a sales call, but it opens eyes and doors, sometimes ones you can't get through with more direct efforts.

Your firm does more than most in terms of content marketing. Your firm's site currently has articles, case studies, podcasts, white papers and presentations, news and alerts, and Kyle's CPA Video Blog listed under "Thought Leadership." Do you find this difficult to manage?

It certainly can be difficult at times. We try to repurpose content as much as we can. Take the topic of cyber-security. We created six articles and an infographic on the topic, then added videos and were interviewed by the local TV and radio news. We also got Laura's comedic take on it for Kyle's blog. We're holding an event next week, and then maybe we'll create a white paper. That is a lot of work, but what we are really doing is finding a hot business issue and repurposing our original content in a variety of ways. If you take one piece of content and repurpose it in six different ways, you have a lot of content without having to build each piece from the ground up. And someone seeing all that content on one topic is likely to see you as the expert you are.

What type of content marketing tends to get the most page views for your firm?

By subject matter, it is clearly tax-related issues. We can never get enough of that, and we have more interaction with tax content than any other subject. Otherwise, it varies depending on the topic and how

(Continued)

immediate the issue is. If we write an informative case study using a company's name, that always drives up the hits because people want to see what's going on with a specific company.

Among accounting marketing circles, you are well known for Kyle's video blog. What made you decide to create a funny video blog that sort of pokes fun at the industry?

It goes back to seizing an opportunity when it presents itself. Some years ago while with a larger firm, I used video in a proposal and won a $10 million audit and tax account. The CFO attributed our competitive difference to the video. So over the years, I always look for appropriate ways to use this powerful channel. My current firm was doing some internal videos created by staff here and there, and we discovered that Kyle had a quirky sense of humor that many people really liked. I asked if he would be willing to create external videos in his funny persona to introduce people to business issues in a humorous way. The idea was to lead viewers to read our more serious content. Kyle loved creating the videos, and we could produce them internally with little cost. It was different and got a lot of attention. We got featured on other blogs and in the national press, and he was even asked for autographs by clients. It got the most traffic to our site of any of our efforts.

What advice do you have for others who are just looking to get started with content marketing at their firms, particularly smaller firms where they may not have the manpower that you do at Brown Smith Wallace?

Tackle one thing at a time. Maybe start writing blog posts first, and then add other methods as you can. Start with a small group of people or a practice area where they are receptive and build a success story. Then that one will lead to others. Create a plan and implement it step by step. If you don't have the internal resources to do it, look for ways to outsource it. Don't hire a generalist but look for those who know the industry so you can leverage their expertise and knowledge, and it won't take as much time or input on your part.

Got any additional advice to share?

Figure out what will work best in your firm and take advantage of the resources you already have on hand. There may be young staff at your firm who would love to help. There are ways you can do it without being too much of a burden. Keep in mind what makes your firm different and reinforce that message in what you do, too.

Chapter 6
Reach New Audiences: Social Media

I do quite a bit of speaking on various accounting marketing topics, and nothing elicits as many eye-rolls as the topic of social media. Until recently, at each engagement I would have more than one accountant argue with me that it was a temporary phenomenon, something that would fade away over time. (Some said the same thing about email back in the day, too, and look what happened there.)

If you are one of the people who views social media with a hefty dose of skepticism, I have bad news for you: it's not going away. In fact, it is becoming more and more integrated into our daily lives, and I expect its impact and use will continue to grow. Undoubtedly, it will evolve over time, and the platforms we use may change (anyone remember MySpace?), but social media as a method of communication is not going anywhere.

In this chapter, we will discuss social media from its humble beginnings to how it has grown to become a part of our daily lives, focusing on its pros and cons and how your firm can use it to increase awareness and grow.

Take Your Marketing Online!: Proven Ways to Grow your Firm in the Digital Age, 2nd Edition. Bonnie Buol Ruszczyk, Kelly Lucas and Sarah Warlick.

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A BRIEF HISTORY OF SOCIAL MEDIA

For some people, social media seems like a relatively new thing, but it's actually been around longer than you may realize. Back in 1997, a site called SixDegrees allowed users to create profiles and list friends much like Facebook does today, thus becoming the very first social network. In the early 2000s, sites like Friendster and MySpace joined the fray, and in 2003, LinkedIn started as the first business-oriented social networking site. SecondLife and Facebook started in 2004. Twitter joined the mix in 2006, and from that point on social media use has skyrocketed. People simply like having a way to connect to others, reach out to long lost friends, brag about their kids, and communicate from the convenience of their own homes. Sure they've long been able to do that via telephone, but with social media they can reach huge numbers at once and "talk" at will without ever having to pause for that pesky listening part that's more obviously necessary in a reciprocal conversation. And don't forget the advantage of being able to post, tweet, or message at any hour of the day or night that's convenient for the sender. You can't call most of your friends at 4 a.m. to chat just because you can't sleep. But if you approach your midnight socializing through social media, you won't disturb anyone, and you're sure to find plenty of friends or strangers similarly afflicted and ready to mingle when you are. With the influx of mobile technology, social media use has expanded even more because we can now photograph our weekend exploits and immediately share them with our friends from our phones. Although it has been argued, quite successfully, that social media has created a generation of people who live online in lieu of face-to-face interaction, its success is indisputable.

It didn't take long for marketing managers at major brands to realize that social media held opportunity for them as well. Obviously LinkedIn was created for this purpose, but business pages quickly started cropping up on the more social sites as well. Many argued that no one would follow a company page, but that was quickly proven wrong when people started signing up for their updates in droves. Promotions and coupons may have helped attract the budget-conscious, but many people were also simply interested in learning more about the companies and brands they used every day. You might not see the appeal of voluntarily connecting with corporate pages, but if social media pages for businesses didn't work, we would have seen them fade away a long time ago.

TYPES OF SOCIAL MEDIA

Let's clarify: Social media is the collection of online communications channels dedicated to community-based input, interaction, content sharing and collaboration. Websites and applications dedicated to

forums, microblogging, social networking, social curation, and wikis are among the different types of social media.[1] It is a very big umbrella, so I'll define each of the descriptors I just mentioned.

- *Forums.* A discussion board (known also by various other names such as "discussion group," "discussion forum," "message board," and "online forum") is a general term for any online "bulletin board" where you can leave and expect to see responses to messages you have left (for example, AmericanExpress OPEN Forum).[2]
- *Microblogging*. A web service that allows the subscriber to broadcast short messages to other subscribers of the service (for example, Twitter).[3]
- *Social networking*. The use of dedicated websites and applications to interact with other users or to find people with interests similar to one's own (for example, Facebook).[4]
- *Social curation*. The collaborative sharing of Web content organized around one or more particular themes or topics (for example, Reddit or Pinterest).[5]
- *Wikis*. A server program that allows users to collaborate in forming the content of a Web site. The term comes from the word "wikiwiki," which means "fast" in the Hawaiian language (for example, Wikipedia).[6]

As social media sites have grown and evolved, many include some way to use all of the sharing options listed, or at least most of them.

THE PROS OF SOCIAL MEDIA FOR YOUR ACCOUNTING FIRM

There are many reasons for an accounting firm to use social media in its marketing mix. It's relatively easy to get started, it's one of the less expensive ways to generate awareness of your firm, and it's a way for you to meet and communicate with less effort than in person. Not good enough? Consider the things social media lets you do:

- **Clearly define your practice areas and industry niches so you can communicate directly to potential clients.** Much like your website

[1] http://whatis.techtarget.com/definition/social-media
[2] http://whatis.techtarget.com/definition/discussion-board-discussion-group-message-board-online-forum
[3] http://searchmobilecomputing.techtarget.com/definition/microblogging
[4] www.oxforddictionaries.com/us/definition/american_english/social-networking
[5] http://whatis.techtarget.com/definition/social-curation
[6] http://searchsoa.techtarget.com/definition/wiki

or other marketing materials, you control the message and positioning of your firm on your social media sites. This is a great place for you to reinforce what you do and who you serve and use lots of keywords and phrases that will help your ideal clients find you. You can even create industry- or service-specific pages for a more targeted approach.

- **Share your expertise and position yourself and your firm as thought leaders in your industry on a consistent and regular basis.** If you are creating content for your firm, social media is one of the best methods of sharing it with your audiences. You don't want every topic on which you write to point back to your firm, but adding your own content to your stream will allow followers to read it and, even better, share it with their followers. If an article is particularly compelling, it can go far and wide in a very short time as others share it on their various networks, where still more readers find and share it in ever-expanding circles. This is what is often referred to as "going viral." Before you know it, you get a comment or a "like" from someone you really want to meet, and it was social media that opened that door for you. On top of that, you might be surprised to learn how many people start their research via social media rather than conducting a broader search when looking for the latest news and information. This is because information on social media pages is fresher and more topical. These platforms make a perfect medium for sharing your expertise with those who are interested, and if you are consistent and responsive, over time you will begin to be recognized as a thought leader.
- **Build relationships with clients, prospects, and referral sources quickly.** You may be surprised to learn how much more open people are on social media than they are in person. This is particularly true of Twitter, which has one of the lowest barriers to entry and allows nearly anyone to reach out to you if you are willing. I've chatted with people on Twitter whom I would have never been able to reach via phone or email. It simply wouldn't happen. This includes leaders in the accounting industry as well as the reporters who cover it. I can easily follow firms from all over the country, and the world, and quickly see what they are concerned about and read what they think is important enough to share. It can give you access to industry movers and shakers like no other method.
- **Small to mid-size firms can affordably build broad awareness by creating and maintaining a strong social media presence.** One of the beauties of social media is that it somewhat levels the playing field and gives smaller firms as much access to the same potential

clients as larger firms. It's not about who has the bigger budget like with more traditional advertising or direct mail. It's more about consistency, time investment, and who is sharing the best information.

- **Network with others in your field and stay on top of new trends, hot topics, and interesting ways to expand your business.** We don't always have the time to pick up the phone and call a colleague across the country for a quick question or to share a fun fact. But it takes a few seconds to send them a note or tag them in a post on social media. Because literally millions (or billions depending on the platform you are using) are doing this, it is one of the best places to find the latest information on nearly any topic, including accounting. In fact, more often than not, nowadays Twitter is getting the scoop on breaking news before the real news sites. It behooves you to do a bit of research to make sure what you are seeing is completely accurate, but often it is.

The skeptics still out there need to understand that social media is certainly more than just people sharing photos of their lunch; it can be an effective and powerful tool for accounting firms. I have to admit I felt a nice sense of validation when I read an article recently from *Business Insider* claiming that "90% of customers will recommend brands after social media interaction."[7] Admittedly, the study was looking at consumer brands and not professional services firms, but the underlying tenet still holds true. Those clients, prospects, and referral sources that have interacted—or, even better, interact on a regular basis—with you online are much more likely to recommend your services to their friends and colleagues. Whether or not you share it, they feel a personal connection with you and your firm because of these interactions. They derive a sense that they know you and that you are responsive to them, both of which make them more likely to work with you and tell their friends they should work with you, too. And because referrals and recommendations are the biggest source of new business for professional services firms, doesn't it seem like a good idea to do something that leads to more of them?

THE CONS OF SOCIAL MEDIA FOR YOUR ACCOUNTING FIRM

It is important to remember that social media is indeed "social." Unlike some of the "push" items we discussed in chapter 2, this is two-way

[7] www.businessinsider.com/90-of-customers-will-recommend-brands-after-social-media-interactions-2013-7

communication at its best. The idea is to create conversations, add comments, and discuss ideas. If all you plan to do is toss up your own material, you won't be using the tool effectively. The goal is to truly communicate, and this requires that you, or someone at your firm, monitor your posts, respond when people comment or ask a question, and even start your own conversations from time to time. Here are a few other things to consider:

- **You have to maintain control.** Some would argue that full control of your pages isn't possible, and I don't completely disagree. But a responsible businessperson will certainly take every chance to make sure the company's pages are locked down as much as possible and managed by a small handful of people. Too many firms create a page and give the intern the reins to run free. Although I'm sure the intern is very conscientious, most people under the age of 30 have a very different idea of privacy than those of us who have been around a bit longer. (See the section that follows on creating a social media policy.) It is vital to inform anyone who is posting to your pages what is and is not acceptable. Others should monitor the pages to make sure nothing untoward is showing up. On top of that, keep in mind that the social nature of these networks means that others can post on your page at any time and say anything they want. This also needs to be monitored closely so you can quickly respond or remove anything that could harm your reputation or brand.
- **Consistency is required.** There is no arguing here; you simply must be consistent with your posts and responses. If you aren't responding to clients and prospects who are posting questions to your Facebook page, it's the same as ignoring someone who is speaking directly to you. No one likes to be ignored, and, in essence, that is what you are doing. It's also important to add new information regularly to keep relationships fresh and to fulfill your role of thought leader. You can't take a six-month break and expect to step back into that position; by then someone else has stepped into the spotlight, and you are unlikely to get it back.
- **It takes time to build an audience.** Building a social media presence and adding tons of followers doesn't happen overnight. I don't care what the ads in your inbox say about gaining thousands of followers quickly; don't fall for their siren song! Keep in mind it's more about quality than quantity, too. You want people who care about what you have to say, not a bunch of random strangers crowding your feeds. If you play by the rules, follow interesting people, post good content, and conduct conversations with your followers, you will grow your audience organically with the right kind of people and thus reap the rewards of your efforts.

WHAT DO I DO NEXT?

Like almost anything in life, there are pros and cons to using social media at your firm. In the next few chapters, I will discuss some of the specific platforms you will want to consider, and I'll give you tips and tricks for getting the most from your efforts.

You Need a Social Media Policy[8]

We all like to think that everyone who works for our firms is knowledgeable about what can and can't be shared publicly. We also want to believe they are polite and thoughtful and would never say something disparaging or careless. But as one sad story after another proves, this isn't always the case. So it is important to create a solid social media policy for your firm and train your staff on it. Having a carefully designed social media policy in place isn't only a matter of establishing standards for politeness; it's necessary if you wish to legally protect your firm and its actions.

Much of business behavior is so entrenched in the culture that it's learned automatically and taken more or less for granted. One wears shoes. One shakes hands. One is especially polite to one's clients and supervisors. Social media, however, has thrown a bit of a wrench into the mix. This is partly due to its fairly recent appearance on the business scene. Without decades (if not centuries) to evolve, the emerging technologies and their capabilities haven't yet resulted in a widely accepted protocol.

As you think about creating your own policy, be aware that most social media policies cover the following areas:

- *Strategy and explanation.* Talk briefly about why your firm is on social media and the platforms you are using as part of this plan.
- *Chain of command.* Identify who is ultimately in charge of your social media presence as well as any others who will be participating in the process. Define the responsibilities of each role and include information on how adverse issues should be addressed.

(Continued)

[8] Excerpted from *Accounting Today*, "A Solid Social Media Policy is Essential for Accounting Firms," September 12, 2012. ©2012 SourceMedia Inc. All rights reserved. Used by permission and protected by the copyright laws of the United States. The printing, copying, redistribution, or retransmission of this content without express written permission is prohibited.

- *What to say and what NOT to say.* What may seem like common sense to you may not be for everyone, so clearly define what can and can't be said on social media. Is it ever appropriate to mention clients on your pages? Are funny posts off limits or welcome fodder? Your firm's personality may dictate some of what is allowed, but never assume that everyone at your firm feels the same way about content as you do.
- *The Internet never forgets.* Everything you say online, even in protected space, can be found and is there forever. Period. Facebook stores every post ever made. The Library of Congress is cataloging tweets. Stress the importance of thinking twice before making a comment or sharing questionable information. It can come back to bite you.
- *Follow the rules about sharing.* Social media is all about sharing content, but there are right and wrong ways to do it. Proper attribution is important when sharing information created by others. You wouldn't want others stealing from you, so make sure that no one at your firm steals from others.
- *Business versus personal use.* Here's where things get a little hairy. Do you know when social media speech is personal, and thus protected by constitutional rights, and when is it representative of the company's official position? At what point does social media speech become an offense for which you can fire someone? It's critical to look into all the angles and cover as many scenarios as you can possibly imagine so that you don't find yourself on the wrong side of the law with future company actions. Consider these two episodes reported by the National Labor Relations Board (NLRB), which is finding itself increasingly involved with incidents relating to social media use.[9]

  > *"A construction contractor fired five employees after several of them appeared in a YouTube video complaining of hazardous working conditions. Following an investigation, the NLRB regional office issued complaint. As a hearing opened, the case settled, with the workers receiving full back pay and declining reinstatement."*
  >
  > *"After a work-related incident, an employee criticized her supervisor in a post on Facebook, which prompted other employees to reply to the posting. The employee was suspended the next day and later fired. The NLRB issued a complaint alleging the employee was unlawfully fired for engaging in protected concerted activity when she posted on Facebook."*

[9] www.nlrb.gov/rights-we-protect/protected-concerted-activity

The company in the Facebook case fired the angry employee based on her violation of their social media policy, which forbade making complaints about supervisors on the internet. They thought they were in the clear. But the NLRB's charge stated that the policy was unlawful in its inclusion of that rule and several others among the company guidelines.

Social media is a powerful tool for business marketing and communications on all levels and can be plenty of fun. It also provides copious opportunities for making very public faux pas that can do your firm a world of hurt. Make sure that you're protecting your firm as you're providing the guidance employees need to successfully navigate the rules. It's a lot more complicated than requesting good manners. The ins and outs of the law in this area, as in so many others, do not follow the dictum of mere common sense. So create a comprehensive social media policy and thoroughly train every employee on it to become familiar with exactly what is expected and allowed. As you develop and implement the policy, watch where you step to protect your firm. This is one of the cases where you might want to involve a professional to ensure you are on the right path.

Interview: Andrew Rose, Zest Social Media Solutions

In accounting marketing circles, Andrew Rose is considered one of the most knowledgeable people when it comes to online marketing, particularly social media. He is asked to speak regularly at conferences because he has quite a success story to tell about his former employer, Naden/Lean LLC, and its dental practice area in particular.

What made you look into social media as a way to build your firm's dental service area?

Like many, I was a reluctant social media user and had to be convinced of its worth before jumping in. In 2006, I heard a presentation about blogging, and the light bulb went off. I started our firm's blog and saw immediate search engine optimization results. I never saw it as a direct sales tool but wanted it to be a resource for those searching for information. With that approach, I was able to develop our reputation as thought leaders, which eventually led Naden/Lean to the position of one of the top three firms in the dental niche nationwide.

(Continued)

Was it hard to convince your partners to buy into it?

Now, many years later, the partners will say they don't really understand what I did, but the phone rang so they loved it. Most CPAs would prefer to sit in their office putting numbers in boxes. I made their lives easy, and the phone continues to ring. Convincing them to do it was not hard because I was able to bring them business relatively quickly.

What did you do first?

First thing I did was optimize the website. Then I started blogging. As the SEO algorithms evolved, I made sure the site evolved with them. Blogging was an enormous success for us; we have over 160,000 views of those dental blogs.

How did your social media activity grow?

I viewed our social media expansion this way: show me value, and we'll give it a shot. But even if I wasn't sure if we would use a platform, I did lock down all of our names on each one. Although there aren't a lot a lot of unscrupulous firms out there, it's still possible for someone to take your name. Once it's gone, it's hard to get back.

Outside of that, it's a mixed bag. The best results come from Google platforms because they are used the most for searches. Many people hate Google+, but it does help move the needle on your site's optimization. LinkedIn is important from a validation point of view. Before most people will call you, they will check you out on LinkedIn. My quick advice there is to have a picture and be smiling in it. And fill out your page as thoroughly as possible. If you don't have the information on your page that potential clients are expecting to see, it will hurt you.

Twitter is a valuable tool. A lot of the reporters are highly attuned to what is on Twitter. It's also a great place for you to broadcast your message, share your blog posts, and create awareness. YouTube is another great tool, but I didn't spend a lot of time on it when I was at Naden/Lean. I would definitely recommend that firms spend time there now and take advantage of it.

When did you feel like it was succeeding?

Almost from day one, but that is not the norm. Partners and others at the firm need to realize and be comfortable with the fact that nearly any marketing efforts can take up to 18 months to return results. If you are looking for immediate results, social media is probably not the place to be.

Can you share an example of some of your results?

I was doing a lot of experimenting with boosted posts [paying a nominal fee to get added exposure to selected audiences for a specific post] on Facebook in March of 2014. I spent $300, which brought in over $24,000 in new business. You don't have to spend a ton of money to get results. But you also have to be comfortable with the opposite happening and seeing no results too.

What advice do you have for others considering this tactic?

First is to claim your domains, get your firm's name on all platforms. Next, listen before you speak. See how others are using it. Every platform has a different language and nuance, and you need to learn those before jumping in. Make sure you are adding value to the conversation. Never use social media as a place to give a sales pitch; instead, offer solutions to problems.

CHAPTER 7
Your Most Powerful Network: LinkedIn

If you are thinking about jumping into social media and only want to take on one platform, your choice should be LinkedIn. In this chapter, we will discuss the platform's rise to prominence and give practical tips on how you and your firm can get the most from it.

WHY IS IT THE ONE TO WATCH?

Unlike most other sites that can be used for both business *and* personal purposes, LinkedIn has been focused on business interactions from the very beginning. If you have any interest in building and leveraging your business network, it is the right tool for the job. It has over 300 million members, and 2 new ones come on board every second. So if you aren't on LinkedIn, you are one of the few at this point. Just for fun, here are a few other interesting facts about the platform:[1]

- Number of users in the United States: 100 million
- Geographical reach: 200 countries and territories

[1] http://expandedramblings.com/index.php/by-the-numbers-a-few-important-linkedin-stats/#.VCCEIkvUfuU

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- Number of languages LinkedIn is available in: 20
- Percentage of users who check LinkedIn daily: 40%
- Average time a user spends monthly on LinkedIn: 17 minutes
- Total number of LinkedIn endorsements: 1 billion
- Increase in likelihood that your profile will get viewed if you include your photo: 11 times
- Percentage of LinkedIn users by gender: 56% male, 44% female
- Percentage of millionaires who use LinkedIn: 41%

Ready to get started or move to the next level?

YOUR PROFILE

Based on those statistics and my conversations with accountants around the country, I'm going to assume that you have a profile on LinkedIn by now. I'd also be willing to bet that you have never finished your profile page, and it's highly likely that you don't take advantage of the amazing functionality of LinkedIn to help expand your reach and ultimately grow your firm.

Having a robust and complete profile can do a number of things for you. It makes you easier to find when other users are searching for someone with your specialty. It also gives people a way to learn more about you, find commonalities, and see what you look like. (This is handy if you are meeting someone for the first time in a public place.) When potential clients are considering working with you and your firm, it is very common for them to go to the LinkedIn profiles of the team they will be working with to see where these professionals have worked before, get a more complete view of their skills, check their endorsements, and read their recommendations. If there is nothing there to see or incomplete information, they may shrug their shoulders and proceed. Some people, though, will view your lack of information as an affront, or, at a minimum, view you as someone who doesn't know the rules of the networking game. I've run into situations where jobs were won and lost based on the information that was found on LinkedIn, so don't underestimate its importance and the influence it can have on decision making.

If you have a profile but haven't done much else with it, or if you just need a refresher, here are some suggestions for getting up to speed:

- Enter the basics:
    - — Enter your name as you'd like to be known in business. The site won't automatically capitalize any letters so be sure you type in all information exactly as you want it to be shown.
    - — Upload a clear profile picture. Make sure this is a professional shot, or at least a good photo of you that does not include anyone else's cropped out arm, hair, or face. A bad LinkedIn picture is the equivalent of showing up for an interview in cut-offs and flip-flops.
    - — Enter a title and keep in mind you can do more than simply write "accountant." For example: "Certified public accountant working with owners of construction and IT firms" rather than the more general "CPA." It will make you more likely to turn up in a search.
    - — Select an industry or sector (like "accounting").
- Update your contact information:
    - — Enter as much contact information as you are comfortable sharing here. Keep in mind that the idea is to be found, so err on the side of oversharing. If you start getting too much spam, you can always dial it back.
        - Notice that LinkedIn breaks up your contact information into two categories: that which is available to your contacts and that which can be seen by anyone on LinkedIn.
    - — Enter your Twitter link if you have one.
    - — Enter your website information. You can enter up to three sites here, so take advantage of the space. And here's a trick to increase your likelihood of being found in a search: Next to each space where you enter your URL, there is a drop down menu. Click on that and choose "Other." Once you do that, you can now enter the name of your site as well as the URL for it. So now rather than saying the generic "Company Website," it says XYZ Firm. Cool, huh?
- Create a summary and fill in specializations:
    - — Write a paragraph or two about what you do, who you serve, what you know, and even a sprinkling of personal information. Think of this as your "book

jacket summary," so include anything that you think people would find interesting. It also pays to use common keywords and phrases in this section because it is searchable.

- Add your specialties now. In most cases, this can be a bulleted list of the things that you do, but you may also want to include information on the clients you serve if that is important to your business.

- Create listings for current and previous jobs:
  - Enter the company name for all of your current and previous roles. If that company has a LinkedIn business page, it will show up as an option as you type. If it does, select it rather than continuing to type the name. This will make you officially connected to that business page and make it easier for you to be found when people run searches based on that organization.
  - List your current title for your current role and the last title you had at previous jobs along with the location for each position.
  - Enter the dates you were employed. If you can't remember exact dates, make an educated guess.
  - Enter a keyword-laden description of what you currently do and what you did in previous roles. Spend most of your time on your current description because that is the one most people will the most attention to, but still fill in as much as you can for the rest of your jobs as well.

- List your educational institutions. As a general rule, you want to enter all universities you attended, particularly those that awarded you a degree. Skip your high school information unless you are under 25 years old:
  - Enter your university name. Just like with your company listing, it will show up on the list if the school has a LinkedIn page. Choose it so your profile will connect to others who attended the same school.
  - Fill in degree and field of study.
  - If you want to list your GPA, you can do so under the "grade" heading.
  - Create a list of your extracurricular activities (the ones you want people to know about) and any honor

or professional societies you joined. Believe it or not, people use this information to find others who have similar interests or who are brothers and sisters from the same fraternities and sororities.

  - Most of the time, people will leave the description section blank because there's not a whole lot to say outside of what you have already entered. But if you have something else to add, feel free to do so here.

- Continue filling out your page, including
  - "Honors & Awards" for anything that might be of interest to a potential connection.
  - "Interests" for the interests you are comfortable sharing.
  - "Organizations" for groups you belong to now or pertinent ones that you have been a member of in the past.
- Add additional information that is applicable to you. LinkedIn also gives you an opportunity to add additional information if you want. These options are located in the right column under your main information and you can simply drag and drop each one to the left to add them to your profile. If any of these will tell your story more thoroughly, feel free to add them and complete the necessary information:
  - Projects
  - Languages
  - Publications
  - Test Scores
  - Courses
  - Patents
  - Certifications (this is an important one if you are a CPA)
  - Volunteering and causes
- Create a custom profile background:
  - Beginning in fall of 2014, LinkedIn began rolling out the ability to create custom backgrounds for personal profiles. If you have this option, you should definitely take advantage of this great opportunity to showcase your firm branding and messaging. It's a rather large area on a computer monitor, so be creative.

Feeling overwhelmed? It can take some time to create a thorough profile, so don't feel like you have to do it all at once. Start by taking care of the top information first, adding a photo, creating a short summary, and updating your contact information. Then add more information as you can, scheduling a few minutes each day or week until it is complete. As you add information, make sure you proofread it carefully for any spelling or grammar errors, or, better yet, ask someone else to take a look for you. Carve out the time you need to do it properly, and raise a glass when you are done.

RECOMMENDATIONS AND ENDORSEMENTS

These two sections require interaction with others for completion, but their importance is inarguable.

Recommendations

This section is where others write a recommendation for you much like we used to get via email or traditional mail. This allows others to sing your praises and talk about how you helped them on a professional level. It is not considered gauche to ask clients to write a recommendation if you know them well and have worked together for a while. The same is true with clients, co-workers, and supervisors in previous positions. Many people go here first to see what others say about you versus what you say about yourself. Although it might make you feel a bit self-conscious, get in the habit of asking for recommendations from others who are particularly happy with your work so you can build this section over time. And be sure to return the favor when asked or just when you feel like it. It will be greatly appreciated and, in many cases, reciprocated.

Endorsements

This section was added in 2012 and caused a bit of confusion. Basically, it is a very quick way for others to endorse your skills and expertise without taking the time to write a full recommendation. When you open your LinkedIn page, at the very top are four boxes with photos of your connections and a recommendation on what you should endorse them for. It's nice to do and does help them show up in searches.

The challenge is that LinkedIn sometimes picks skills that just don't fit. For example, because I'm in accounting marketing, some of my followers are prompted to endorse me for things like tax preparation even though I don't come anywhere near doing that. But because they want to help me out, they click it without thinking too hard. So if you find you are being endorsed for things you don't do, you can control the list that they can

choose from. Just click the pencil icon next to your endorsement section, delete any that are inappropriate and add others that are a better fit. You can drag them around so they are placed in the order you want, moving your key skills to the top of the list. Then, going forward, these skills will show up on your connections' pages so your endorsements will match your true skill set.

YOUR FIRM'S LINKEDIN PAGE

After spending the time on your individual profile, you will find that setting up a firm page is a breeze. There are far fewer sections that need to be completed, particularly because they eliminated the "Products & Services" tab in 2013.

The overall idea of a company page is to give LinkedIn users a place to learn more about your firm. With limited space to tell your story, it pays to use keywords as much as you can but to also to make the content compelling and interesting to readers who may know nothing about your firm when they stumble upon it. Additionally, because individual employee profiles should link to the firm page, it will show who works—and has worked in the past—for your firm. Those who are interested can follow your company page so that your updates will show up in their feed, which helps them stay abreast of what is happening.

Not just anyone can create a company profile page, and only those who include your firm as an employer or previous employer can connect to it. To create a page, you must have a personal LinkedIn profile with a strength rating of "intermediate" or "all-star." (The strength measure of your profile shows up in the right column of your personal page. The more you have completed, the stronger your profile is. If you follow the steps I just outlined, you'll be fine.) On top of that, you must have several connections, your position at the company must be listed on your profile, and, most importantly, your *company* email address must be added and confirmed to your LinkedIn account. This may seem like a lot of hoops to jump through, but these requirements are put in place to keep random people from creating company pages willy-nilly and to keep people from claiming the pages of firms that aren't their own. It's in your firm's best interest.

Completing your company page at this point is much like filling in your personal profile. You'll need to do these things:

- Complete the company description using key phrases that other users are likely to enter when looking for a service provider that does what you do. Because this section is narrative—just like the summary on your personal profile—you can enter whatever you

want. You may want to break it up with subheads that include who you serve, what you do, why you're different, and so on.

- Enter your specialties, using as many words as they will allow. This will help members find you as well.
- Continue to fill in your company information, including your website address, physical address, industry, company size, type of business, and year you were founded. These sections tend to be populated via choices you make from a dropdown menu, so you have less control over what goes here. Just pick the one that is closest if the perfect answer isn't an option.
- Upload your logo. This will be the image that will be visible on the profiles of those who connect to your firm, both previous employees and current ones. If your full logo shows up well (keep in mind it's a small image being displayed), wonderful. If not, you can also use the primary icon from your logo.
- Create and upload a banner image to your business page. Similar to the custom background on personal profiles, business pages allow you to upload a larger image that carries your branding and messaging to enhance the appearance of your page. These can be changed out at any time, so be creative. Besides putting up another show of your logo, carry any current marketing messages or campaigns into the banner.

That's about it for setting up your LinkedIn business page. Remember: you want all of your employees' pages to link to this one, so once it is set up, you'll need to ask them to edit their personal profiles and re-enter the company name for their current employer section so they can choose your firm page as it shows up rather than type in the name. Once they do this, they will show up as employees in the right column of your company page. See? I told you it was easy!

Now that you are all set up, what can you really "do" with LinkedIn? That all depends on your goals, but the possibilities truly are great. In the rest of this chapter, we will talk about ways that your firm can use LinkedIn to meet prospects, research potential job candidates, and even continue to build on your thought leadership initiatives.

MAKING CONNECTIONS

Now it's time to put those profiles to good use! The easiest way to get started is to send connection requests to people you know, your colleagues, friends, and former work buddies. Even family members should be connections. The whole point is to create as wide a network as possible; you just never know who your Uncle Joe or Cousin Betty is connected to. They may be the perfect referral for you, but you'll never

know if you don't connect first. Just type their names into the search bar at the top of the page. If they are on LinkedIn, they will likely show up. If they don't show up, it's possible that they go by a middle name or nickname. Keep in mind that some names are more common than others, and you may have to dig a bit. To add someone to your connections, you simply click on the "Connect" button and an invitation screen will pop up. LinkedIn discourages random connections, so this page helps them weed out the people who are spammers or just trying to pad their numbers.

You will be asked to choose one of the following labels to describe your relationship with the person you are trying to connect to:

- "Colleague:" someone you currently work with or have worked with in the past. If you click this, your list of employers will pop up so you can choose where you worked together.
- "Classmate:" someone you attended school with. If you click this, your list of educational institutions will pop up so you can choose where you attended school together.
- "We've done business together:" a client, vendor, or some other type of working relationship. If you click this, your list of employers will pop up so you can choose the company where you did business together.
- "Friend:" simply someone you know. In most cases, you will be asked to enter their email address to prove that you know this person.
- "Groups:" someone in one of the groups to which you belong. If you click this, your list of groups that you have in common will pop up so you can click the one that fits.
- "Other:" this gives you a spot to click in case none of the others fit. You will be prompted to enter their email address to help the site weed out spammers.
- "I don't know this person:" in most cases, you don't want to use this option.

You will also notice that there is a box below these options where you can enter a personal message. It is pre-populated with "I'd like to add you to my professional network on LinkedIn," and your name. I can't stress this enough: **take the time to enter a real message to the person with whom you want to connect.** First of all, it's only polite. Secondly, it is a quick reminder of who you are, where you met, or why you want to connect. If this isn't someone you interact with on a regular basis, a note reminding him or her who you are and explaining why you want to connect goes a long way in convincing this person to connect to you.

Something to note with the "Friend" option: many people default to this even if they don't actually know the person. I don't recommend this. If

you are not truly a friend, don't say that. Only connect with someone you have a direct relationship with and select the appropriate relationship, be it "Group," "Classmate," or whatever. Otherwise, either use the method "Other" and submit their email address from a business card if you met them through networking, or, if you don't have that, use the "Introduction" email process through LinkedIn. That's what it's there for.

A word of warning: when someone receives your invitation, they can choose to connect or not; it's entirely up to them, and you won't get a message unless they accept your request. You can only send one request to a person, so if they decline or simply don't respond, you can't keep on stalking them over time. Each request also allows the recipient to click "I don't know this person." You don't want to get too many of these responses. LinkedIn doesn't publish its algorithm, but if you get very many of these, you will be punished. First, you'll have to start entering email addresses for each and every connection request, regardless of how you are connected. If too many people say they don't know you, you will eventually be kicked off LinkedIn entirely. So it pays to be careful with your connection requests.

Once you start building your connections, you will have access to more and more people as well. LinkedIn allows you to connect to first- and second-degree connections, which means your connections, their connections, and their connections' connections. So you can see that as you add more people, your pool of potential connections grows exponentially. The one exception to this rule is for common group members. If you share a group, you may communicate with that person whether or not you have any degree of connection. One of the great advantages of joining groups is that it expands your reach and gives you access to people who you might not be able to reach directly.

YOUR GROUPS

LinkedIn Groups can be a great way for you to expand your reach and meet others in your industry, referral sources, and potential clients. You can find the "Groups" section under the "Interests" tab at the top of your profile page. From there you can search for groups of interest, adjust your settings by clicking on the gear icon, and start a discussion within one of your groups as well. You can join a maximum of 50 different groups and adjust the settings for each to meet your needs. In most cases, you will want to adjust how often you are sent email updates from each group to once a week because it can get quickly overwhelming to have each group sending you a daily update.

The "Groups" feature is one of the most powerful tools within LinkedIn, and participation is one of the best ways to get value from the time you

spend on the platform. It's like a smaller, more intimate gathering where you can really get to know the members. You can learn all kinds of useful information to benefit your career as well as build valuable relationships. The following tips will help you get the most from this incredibly useful feature, but this list really just scratches the surface. Consider it a little preliminary information so you can decide if joining or creating a group is the right thing for you and your firm.

Joining

The best place to start is to join groups that already exist and start actively participating to get the hang of how they work. Here are a few tips to get started:

- **Look for groups in the industry you are trying to reach.** Use the search feature to see what is already out there before creating a brand new group. Someone may have already done it for you.
- **Look to see what groups your clients are in.** This is a great way to see which groups are out there that may be good for you to join.
- **Add value and be active.** Make regular posts and start discussions that are on topic and interesting to other members. Also, add comments to posts that others have uploaded to build more awareness of you and your firm.
- **Connect directly to those you find interesting.** Being a part of a group gives you access to LinkedIn members you may have never found any other way. Send connection requests (personalized, of course) to those with whom you want to connect directly. And don't just make it about professional interests. If you like to scuba dive, join a scuba group on LinkedIn. If you enjoy running marathons, join a running group. These often create strong connections through the shared interest and generate a sense of camaraderie.

Creating

Once you are comfortable participating in groups that others have created, you might want to create one of your own. Think about these key points if you do:

- **Pick a good group name.** Use keywords that your target audience will search for, and make sure your purpose is clear.
- **Create a group for an industry or niche, not your firm.** People will be more likely to join this way. A firm group will probably only bring in members of your firm, and it feels too self-serving. Use your company profile page for this purpose.

- **Decide whether you want it to be an open or closed group.** Anyone can join an open group, and content posted in this group is indexed by search engines and can be shared to Twitter and Facebook. Members-only groups are much more controlled.
- **Control content and members.** As the manager of a group, you have a certain amount of control about what goes on in your group but also have responsibility to manage it.

Promoting

Once your group is up and running, you will want to get others involved so it grows. Start by doing these things first:

- **Invite co-workers, colleagues, clients, and referral sources to join.** This will get you started until others become aware of your group.
- **Promote the group on your website, blog, email newsletter, email signature, and any other social media networks.** It's not enough to wait for people to search you out!
- **Invite industry experts to join and engage.** The more interesting the people and posts in your group, the more people will want to be a part of it.
- **Integrate your group into your other marketing efforts.** Every time you host a webinar, hold a lunch and learn, or attend a meeting, notify your group. Promote the group when you have speaking opportunities, too. Also consider posting a recap of meeting content after it takes place.

Managing

Nothing in life comes easily. Keep in mind that groups are like all relationships in that they take work. Here are some things you can do to keep it from getting stagnant:

- **Add discussions, news, and jobs.** The more opportunities for interaction, the more valuable the group will be to the members.
- **Use featured discussions to highlight particular content.** As the manager of a group, you can decide what content gets featured in the top of your group page. Use this wisely.
- **Import your blog RSS feed.** If you have a blog, you can automatically post content as it's added to your group page.
- **If your group is members-only, you'll have to manually approve each member.** It's nice to send a welcome note with any group rules included as members join.

- **Highlight active group members.** Add them to the featured post or thank them for adding beneficial content. Active members are important to any growing group.
- **It's about the GROUP, not YOU.** It's not about selling your services, though you can talk about what you do. It's more about interaction and conversation.
- **Poll the group to find out what they are interested in.** This is a great way to check in from time to time to make sure members are engaged and getting what they want from the group.
- **Keep an eye out for off-topic or rude posts.** Send a note to those who are not "playing nice" asking them to get in line. If they continue, delete them from the group. It's your responsibility as a manager to keep the group clean and beneficial to members.

This just really scratches the surface but offers some preliminary information so you can decide if joining or creating a group is the right thing for you and your firm. Group participation is one of the best ways to get value from the time you spend on LinkedIn. It's a smaller, more intimate gathering where you can really get to know the members.

SEARCH OPTIONS

Let's say you want to start targeting law firms in your area for potential partnerships. You know a few attorneys already, but there are quite a few firms in your market with which you'd like to connect and build relationships. LinkedIn Search is here to help.

In a preceding section of this chapter, we discussed how you are able to enter a name into the search bar at the top of the page to find people. You can also do this with companies, universities, groups, and nearly anything that is found on LinkedIn. But sometimes you aren't sure exactly what you are looking for, and this is where the Advanced Search feature comes into play. To get started, simply click on "Advanced" next to the magnifying glass icon at the top of the page. From here you can enter a variety of search terms to find the information, companies, and people you want. The more specific you can be, the better the results LinkedIn will return. The primary options include

- keywords,
- first name,
- last name,
- title,
- company,
- school,

- location,
- country, and
- postal code.

In addition to this, you have a variety of other options to choose from to further narrow your results. Playing around with it and entering different information is the best way to learn how to use this feature. The results can put you on your way to connecting and creating beneficial professional partnerships.

OTHER WAYS TO USE LINKEDIN

LinkedIn is always adding and removing features, so it's not always easy to stay on top of all of them at any given time. The ones listed in the next paragraphs are a handful you may want to consider as you grow your presence on LinkedIn.

Ads

LinkedIn allows businesses to purchase ads that you'll notice as you click through the site. LinkedIn limits the number of ads per page so they don't start to overwhelm the content or drive users away. The beauty of this option is that you have the ability to very specifically target your ad to exactly the people you want to reach, which is phenomenal. Think about all the information LinkedIn has gathered on each and every member. This data is now available to you as an advertiser. For instance, you can say that you would like your ad to be seen by attorneys between the ages of 35 and 50 in the greater Dallas area. You can further say that you would like to only include those who attended a college in Texas, are women, and who make more than $100,000 a year. So unlike other ad options, you can ensure that your ad only shows up on a very limited number of pages for those who are most likely to need your services.

Job or Candidate Search

LinkedIn has quickly become the site where people go to search for jobs and also look for good candidates for open positions. There is a fee to list jobs on the site, but because so much information is already found on the site, it's just easier to look there than other places. Your profile page can serve as your online resume, and you can see information about candidates that might not turn up on their more traditional résumés. If you are looking to make a move or hire some new team members, it is definitely worthwhile to check out the feature. The bonus of searching for a job or seeking a candidate through LinkedIn is that you also have the ability to see if and how you are already connected to the target

candidate or those directly involved in staffing that job you really want. For those hiring, you may be able to talk with those directly connected to your candidate and get better insight than just what is posted on their account. For candidates, you now have the potential to network directly with those hiring, helping to move your résumé and name to the top of the stack.

Messages and InMail

This is basically the email system within the LinkedIn platform. You can have your LinkedIn messages forwarded to your regular inbox or simply review them on the site. This is where all of your connection requests will come, but it is also a nice way to send a note to people who you are connected to but whose email address you may not have. This inbox can quickly get filled up with a variety of messages, so do try to review, respond, and delete at least once a month so it doesn't get out of hand. For those who pay for premium LinkedIn access (see pros and cons discussed in the next section), you have a limited number of InMails available to you each month depending on the level of access you purchase. These allow you to directly contact someone even if you aren't connected. This can be a great way to reach out to those you are trying to establish new relationships with. But tread carefully because recipients have the ability to reject them if they feel they are being randomly solicited. Too many reports of solicitation by you will result in revocation of LinkedIn benefits.

PAID VERSUS FREE

I am frequently asked if upgrading to a paid membership in LinkedIn is worth the cost. Of course that answer depends on what you want to get from the platform. In the vast majority of cases, the free membership is more than sufficient for what the average accountant wants to do. I typically recommend that you try to use the free membership to its fullest and see if it meets your needs. If you want things like expanded search functionality or the ability to see who is viewing your profile, it might be worthwhile to try the paid option for a month or two to see if you really use it. Most people get along just fine on the free option, so you might as well keep your $50 or $75 a month. Or ask your colleagues which version they use and why.

LinkedIn provides myriad opportunities for you to connect, research, learn, and grow, but it takes time and effort to get the most from the platform. Don't feel like you have to use each and every feature or try to do everything at once. It will quickly start to take up more time than you have, and you'll leave in frustration. If you really want to see what the

platform can do for you, carve out a block of time every week to focus on one section. Get your profile 100 percent completed, and make sure you have a company page. Look into joining a few groups and start making connections. Add an update to your page and comment on something another person posted. Before you know it, you will be a LinkedIn expert and taking full advantage of the great things this all-business network has to offer.

In the next chapter, we will expand this discussion into other social media platforms, including Facebook, Twitter, and some that may be new to you.

Interview: Cindy Hagemann, Freelance Marketing Professional and LinkedIn Instructor

Cindy Hagemann is no novice when it comes to using LinkedIn or accounting marketing in general. Prior to starting her current role as an independent marketing advisor, she was in charge of marketing at three different accounting firms. Regardless of the size of the firm, she is consistently surprised to find that although most people believe it is important to use LinkedIn, few spend the time necessary to get the most from the tool.

You were actively using LinkedIn as far back as 2008, long before most in the accounting industry had even heard of the platform. What made you decide to embrace it so early?

I actually got on LinkedIn in 2003 when it first came out. At the time, I worked for an economic development group and was interested in trying to network and bring in business. I set up a profile but didn't do much with it. In 2008, I went to work for my first accounting firm in Norfolk, VA. The managing shareholder told me one of my first tasks was to get everyone at the firm on LinkedIn. To really get to know the platform, I took a couple of classes and partnered with an outside expert, too. We divided our 100 people into classes and showed them how to set up their profiles and explained why it's important. The more I learned, the more I wanted to learn. I was amazed at how much it could do.

How did you convince the CPAs at your firm that this was a valuable business development tool?

I started teaching classes to the employees, and even those who didn't want to learn how to use LinkedIn themselves were supportive of me teaching others. One of the best ways to show its power is with SEO, since it makes you so much easier to find.

What percentage of your CPAs wound up actively using it?

I'd say 80 to 90 percent were on it, but probably only about 40 to 50 percent really knew what they were doing. Just because you connect to people doesn't mean you are using it correctly.

Is there a correlation between age and LinkedIn adoption or usage?

Younger people may be tech-savvy and social media-savvy, but I've found that often they don't know a thing about LinkedIn and why they should use it. Older people (mid-50s and up) fight it as well. Those in the age range of 25 to 55 seem to use it the most because they are the people who are trying to build their careers and bring in business for the firm.

What sort of return on investment have you seen from those who use LinkedIn regularly?

People who are really into business development can get a ton of value out of LinkedIn. Although ROI is hard to measure, I have several success stories of when we have been able to make a connection through the platform that turned into business. For example, one accounting firm that I worked for had me doing a lot of business development, and LinkedIn was my number one tool. We would have a prospect list for each industry niche, using LinkedIn to research the different companies, their principals, what they are involved in, and so on.

We were really interested in pursuing one particular company, and I found out from LinkedIn that the president was a huge supporter of a large but not well-known charity. After doing some further research, I discovered that the company was putting on an annual fundraising event for this charity and looking for sponsors. I contacted the president directly on LinkedIn and told him our firm would like to be a sponsor. He was very appreciative and gave me all the info needed to get us on as a sponsor as well as seats to the event at a table near his. That night we were able to meet the president and many others from the company. The president appreciated our support, sent me a note, and connected with us on LinkedIn, and we kept in touch. Within six months, we got a call from them saying that they were looking for a new accounting firm.

Have you started any groups? If so, what has been your experience with these groups?

Yes, I've had great success with groups. When I was at Wall, Einhorn & Chernitzer, we started a government contracting LinkedIn group that was very successful. It was the first time I had started a group, so I really wanted to do it right. I started targeting potential members who I wanted to join—those who would appreciate the content we post but

(Continued)

also post their own. I found an attorney in Washington, D.C., and invited him to share blog content with our group. In time, our membership started growing, and he was excited about being part of it because it was an opportunity for him to reach new markets. I sought out others as well, and it really became a hub for those in government contracting, all sharing information and discussing strategies for serving this audience.

What advice do you have for those just getting started on LinkedIn or looking to expand their use of the platform?

Take a class, read a book, hire an expert, and know what you want to get out of it. Do you want to grow your firm, simply increase your network, or look for a job? You need to tailor your activity based on your goals. Set up a complete profile, and get everyone at your firm to do the same in a consistent manner. Also make sure to set up a firm profile and maintain that same branding and language throughout.

Chapter 8

The Right Social Media Tool for the Job: Twitter, Facebook, and More

LinkedIn is the obvious first choice for those wanting to test the social media waters, but it isn't the only option available. In fact, it seems that almost weekly (nay, even daily) there's a new social media platform or app being introduced that will "revolutionize" the way we communicate. Many of these prove to be just another flash in the pan, but some can add true value to your marketing mix when used appropriately.

In this chapter, we will talk about the big players like Facebook and Twitter, as well as a variety of other social media options. We'll discuss the pros and cons of each as well as provide some practical how-to advice on the best ways to use these channels to boost your firm's signal.

It's Not Just Reports on Lattes and Grandkids

Contrary to popular belief, not every post on Twitter is about standing in line to get a latte, and not every update on Facebook has to be about

Take Your Marketing Online!: Proven Ways to Grow your Firm in the Digital Age, 2nd Edition. Bonnie Buol Ruszczyk, Kelly Lucas and Sarah Warlick.

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someone's grandkids (though, admittedly, those posts do occur rather frequently). I like to think of social media as the digital equivalent of walking through a cafeteria and catching bits and pieces of conversations as you pass by. Sometimes the conversation is just mindless chatter ("Oh my goodness this pizza is the best!") and sometimes it can grab your attention and make you want to listen in or add your own two cents ("Fair tax is the way to go, and you know it!").

Regardless of the subject, the fact is that there is an online conversation taking place every day, and if you don't participate, you could miss out on some amazing opportunities. People have different preferences about the way they like to receive information. Some want a newsletter dropped in their inbox. Some would rather venture out to a website they enjoy and find it themselves, and others want to have a constantly updated newsfeed on their desktops. It's important to have a positive presence in many of the places that your potential clients can be found. Taking advantage of these online media platforms will help you increase awareness of your firm, establish industry knowledge and dominance, and create an online community of clients, prospects, and other partners.

Even if you aren't an avid participant in social media, many other people are. Quite a few of them could be potential clients, so push yourself a little out of your comfort zone and begin working social media into your overall marketing mix. We recommend starting with the most common ones: Twitter and Facebook.

TWITTER

Twitter is a communications and community-building tool where users create short updates (tweets) of 140 characters or less. These tweets then fall into a newsfeed for others to find and read. More and more people every day are beginning to rely on Twitter to provide them up-to-the-second news of what's happening in the world, so be someone who provides this information.

Why use Twitter? For starters, it's the second most popular social media platform[1] just after Facebook (which we will discuss later in this chapter) with over 310 million users. And did we mention it's free? So basically there's an audience of millions, and you have access to them for no monetary investment on your part. Who could pass that up? True, not every person on Twitter is your ideal client, but there are many users who do fit the bill. And you want to be in front of them. Of course, though the price to play is technically free, you do still have to invest time and energy to set up your profile properly and keep it updated. Just

[1] http://www.ebizmba.com/articles/social-networking-websites

as with any decent endeavor, you have to be willing to put in some effort. Luckily, we're here to help you get things moving.

Creating Your Twitter Account

It's very easy to create a Twitter account. First, go to www.twitter.com. All you need is a valid email address and the ability to create a Twitter handle (your Twitter profile name) and you're set. Note that because there are millions of registered users on this site already, you might have to experiment a couple times to come up with a unique handle. In fact, even if you aren't quite ready to jump into Twitter, we recommend registering your firm's Twitter handle if it hasn't already been taken.

Once you've secured your Twitter handle, it's time to fill out the profile and make it look good:

- **Add a profile picture.** This is often a firm's logo, or, if you are a sole practitioner, you can use your headshot. The important thing is that it is a clear picture so that people can easily identify what they are seeing when you are tweeting. This image should be sized to 400 × 400 pixels for best quality.
- **Fill in the bio section.** Each Twitter profile allows you to write out a short bio. Use this area to highlight your key service areas, target industries, latest awards, and the like.
- **Add your website.** There is a spot to link to your website, so make sure you do so!
- **Set your theme color.** You can adjust the colors of your links and the color of your profile theme to match or coordinate with your brand colors.
- **Post a profile banner image.** Create a custom banner image that sits at the top of your profile page. You can be creative here and design something that looks like your website header, dovetails with your branding, or perhaps promotes your latest awards, for example. This image should be sized to 1500 × 500 pixels for best quality.
- Last, but definitely not least, **go ahead and post a handful of initial tweets.** This way, when someone goes to check out your brand new profile, it's not blank. A blank profile is a big turn off.

Following and Getting Followed

Now that you've got your profile set up, let's find people to follow. Although you want other users to seek you out and follow your every tweet, often this process starts with you taking the first step to engage them.

So which profiles should you follow first? The sky is the limit, but these are some great places to start:

- *Clients.* Do your clients have Twitter accounts? If so, find and start following them.
- *Colleagues and contacts.* Search for and start following profiles belonging to colleagues and connections.
- *Industry publications.* Have a favorite website or newsletter? Find the Twitter account for each one you like and follow.
- *Favorite vendors and business partners.* Even hunt down and follow your favorite business caterer and other kinds of service providers; they can be a great source of referrals as long as you're top of mind.
- *Using Twitter Search.* Set up searches on terms that relate to the services you provide. If someone is seeking assistance with one of your search topics, you can use that opportunity to respond and potentially build a relationship.

Many times, those you follow will follow you back. It's not 100 percent reciprocal, but this method is still a great way to start building your following. The more followers you have, the more legit you are perceived by Twitter, and the platform will then make recommendations to others based on your follower base and the content you share. It's also important to add your profile information to your website and email signature so that everyone with whom you communicate is aware that you have a profile. (The same goes for all social media profiles you create.)

What to Tweet

Twitter is about participating in the conversation, contributing ideas, showcasing your firm as a thought leader, and creating firm awareness. We recommended that you tweet frequently (minimum 2 to 3 times a week to get you started) and routinely check the feed to see if questions are being directed to you or if there are questions you can answer for others. A tweet is an invitation to something more; with only 140 characters, you can only say so much. Tweets invite followers to read further and learn more. Use those limited characters to engage others and invite them to learn more about you and your services.

Most accounting firms will tweet links to their own blog posts and website announcements as well as relevant links from other reputable sources. Your tweets don't have to solely be information that you or your firm wrote; in fact, it's best to mix it up a bit. Although posting your original content can drive traffic back to your site and showcase your thought leadership, if that is all you post, it looks like you are simply pushing information instead of participating in a social network. This is why you should share links from those publications you frequently read

or re-tweet (share) a link someone you follow has posted. You can also have a little fun with it. Many firms use social media to let their hair down and display the firm's culture, especially if their focus is to use the platform for recruiting.

For example, this is an engaging series of tweets from an accounting firm that demonstrates how mixing up the content you share can show your expertise and personality at the same time:

- Day 1: Share one of your firm's blog posts with a question asking for others to share their opinion on the topic.
- Day 2: Retweet an article from Inc. or another business publication about the traits that successful small business owners need to have.
- Day 3: Ask a question about how your followers deal with a particular topic or how they are responding to a specific issue.
- Day 4: Share a link to pictures of your firm's recent volunteer outing, encouraging others to give back to their communities.
- Day 5: Retweet a funny post about the accounting industry or an invitation to an event taking place in your city.
- Day 6: Respond to someone else's tweet with your opinion, expanding the conversation they started.

This is just an example, but you can see where I am going with it. You certainly want to share your expertise and thought leadership, but it's also important to show that you are human, people who care about things other than accounting. Think about it like a cocktail party conversation. You are likely to talk a bit about work, but you'll also move on to other topics like your hobbies, the good things that are happening in your community, or even your kids and pets. No one wants to hang out with the person who is constantly talking about what they do and getting all pushy about their opinions. Those who can discuss a variety of topics make the best Twitter followers and cocktail party guests.

Once you've got everything in place in your profile and have sent out your first handful of tweets, it's important to stick with it. There's nothing worse than clicking on a profile and seeing that it's been months since anything new was shared. Be consistent with your posts and remain active, and you'll soon see that Twitter can be an amazing way of keeping your name and brand out and about.

FACEBOOK

Facebook is another incredibly popular social media platform that connects users with others around the world. It lets firms create business pages that allow for easy sharing of information that drops into user newsfeeds. The big benefit of this is that millions of people check their

Facebook feed several times a day to see what Uncle Joe and Aunt Sue are up to. Just underneath those updates are posts from a business page they follow. So while those users are getting warm fuzzies from their families and friends, they're also learning about businesses and the information those businesses have to share.

Creating Your Facebook Business Page

The first thing you need to be aware of is that you cannot create a company page on its own with its own separate login. As on LinkedIn, the firm's page must be created first through an individual user profile page. Once the page is created by a registered Facebook user, the page owner can add additional administrators to help manage the profile. Having to go through your own personal account to start a business page makes some people nervous because they fear that this will somehow mean random visitors will have access to personal Facebook profiles. We're here to tell you that there is little to worry about. If you manage a business page, your personal profile and its data are kept completely separate from the business page. No one who "Likes" your business page will be able to see anything on your personal profile as long as your settings are set appropriately.

To access your Facebook settings, follow these steps:

- From your personal page, go to the top right corner and click on the down arrow.
- This brings up a drop down menu. Click on "Settings" which you'll find about 2/3 of the way down the menu.
- On this page, click on both "Security" and "Privacy" and make sure both are set to your comfort level. Click "Close" as you make edits to each section and those changes will be saved.

So now that we've got the page secured, let's starting filling in the blanks:

- **Add a profile picture.** This is often a firm's logo, or, if you are a sole practitioner, you can use your headshot. The important thing is that you use a clear picture so that people can easily identify what they are seeing when you are posting because this will be visible in their newsfeeds. This image should be sized to 180 x 180 pixels for best quality.
- **Fill in the "About" section.** Each Facebook business page allows you to include information about your firm. Use this area to highlight your key service areas, target industries, latest awards, and other important facts as well as listing your location and ways to contact you.
- **Add your website.** There is a spot to link to your website, so make sure you do so!

- **Post an image.** Create a custom Facebook cover image that sits at the top of your page. You can be creative here and design something that dovetails with your branding or perhaps features some of your employees. This image should be sized to 851 × 315 pixels for best quality.
- Last, but definitely not least, go ahead and **post a handful of initial links and add in some photos of your staff** to get things started.

Getting People to "Like" You

You're a likable firm with friendly staff, right? So what's not to "Like"? It's quite easy for creators of new business pages to become obsessed with getting crazy amounts of people to "Like" their page. But it just doesn't happen that way. Pages for major brands and well-known companies have thousands or even millions of followers, but it's just not realistic for you to expect to hit those sorts of numbers. Even hundreds of followers might not be in the cards. Don't get caught in the numbers-game trap. Just remember that it's about having quality content that draws quality followers.

The first, most obvious step to getting people to follow your page is to start with getting your staff to follow it. Send out the link to everyone in your firm and make sure they connect with the page. Once this is done, go through your personal Facebook connections and "recommend" the page to them (there's a button on the business page that allows you to do this quickly) and ask your staff to do the same.

Yes, it's somewhat padding the numbers to get started, but this isn't necessarily a bad thing. When new people visit your page and see there's already a decent number of followers, they'll be more inclined to "Like" your page. The real benefit though is that it keeps your firm in front of friends and acquaintances who may not think about what you do on a regular basis. So when a friend posts on Facebook that she is looking for someone who can answer international tax questions, you're more likely to be referred, and she can quickly share your page's link straight through Facebook.

Unlike Twitter, where you can go out and proactively follow people with the hope they'll follow you back, Facebook doesn't allow you to go after followers like this. The platform is set up to make you earn the "Likes." As mentioned before, you can gain a larger following by directly asking contacts, but what really makes the difference is increased awareness of your page. Make sure a link to your Facebook page is in your email signature and on your website contact and home pages, and add a link to any newsletters you send out. But once they are there, it's up to you to make sure you are sharing quality content that will make people want to hit the "Like" button.

What to Post

Like Twitter, the purpose of having a Facebook account is to participate in the online conversation taking place every day and to contribute valuable insight and intelligence to your followers. Quite often, the links and information shared on Facebook can be the same ones that are used on Twitter (for example, firm announcements, blog posts, and sharing links from credible sources). These will fall into your followers' a newsfeed, also referred to as a "timeline." We recommend that you post at least two or three times a week and routinely check your profile to see if anyone is commenting on your posts or asking questions so you can respond in a timely manner.

I've listed a potential series of Facebook posts that should be engaging for your audience of Facebook followers:

- Day 1: Share one of your firm's blog posts with a question asking for others to share their opinion on the topic (same as you did on Twitter).
- Day 2: Post a photo of your recent Lunch and Learn, sharing the topic that was discussed and asking those who attended to comment.
- Day 3: Retweet an article from Inc. or another business publication about the traits that successful small business owners need to have and invite followers to attend an upcoming webinar on just this topic.
- Day 4: Ask a question about how your followers deal with a particular topic or how they are responding to a specific issue (same as you did on Twitter).
- Day 5: Share a comic that pokes fun at the accounting industry with a wry comment.
- Day 6: Create an album of pictures from your firm's recent volunteer outing with informational and humorous captions on each image.

As you can see, there is a decent amount of overlap in the content being shared on Twitter and Facebook, and that's not a bad thing at all. Facebook allows you to go into more detail because it doesn't have the 140 character limit to posts, so take advantage of that when possible. But don't feel like something that is shared on Twitter can't be reposted on Facebook either.

One of the major differences between Facebook and Twitter is that you can take better advantage of visual elements in Facebook. Yes, you can add images to Twitter, but with Facebook, not only will the images show up in the feed, but they are housed on your Facebook page in albums. Have an office Christmas party? Post the photos. Attend the latest AICPA

conference? Share some snapshots of the event. You can also just share random photos of office antics so that people can get a feel for your firm's personality (which isn't exactly an oxymoron). This can be a great asset for firms when they are actively recruiting, particularly with younger people. Although it may sound crazy to those of us who are north of 40, I've heard recent college grads say they weigh the content on a Facebook page very highly when making a decision about where to go to work.

Another added bonus of Facebook is the ability to create and share an event. If your firm is participating in a fundraising 5K, consider creating an event with the date and location and sharing the information with your followers, encouraging them to join you in this great cause. If you will be hosting a recruiting dinner for potential associates at a university, you could create a private event that is sent exclusively to targeted students.

ADDITIONAL SOCIAL MEDIA PLATFORMS AND TOOLS

Twitter, Facebook, and LinkedIn are the big players, but there are several other social media platforms you may want to consider adding to the mix depending on your business and marketing goals. We've listed a few of them after this paragraph. Some of these you'll likely recognize, others you might have only heard of vaguely, and still others you may have never encountered at all. Something to keep in mind is that social media is very fluid, so while these platforms are alive and well at the time this book is being written and published, some of them may well be gone and new ones may have entered the mix by the time you read the book. But if they have managed to stay the course online, check them out and see if they might be a good fit with your objectives:

- *iShade (www.ishade.com).* iShade is a social networking site focused on the accounting industry. It's similar to LinkedIn in that you can create both individual and firm profiles, post updates, join groups, and connect with other users. Additionally, the site offers free access to industry experts during their "Ask The Expert" sessions.
- *YouTube (www.youtube.com).* YouTube is a social network where you can upload personally created videos or even share videos from other profiles, also called "channels." Additionally, any videos you create can be shared via your other social media accounts and then embedded into your website. This is great as an extra way to enhance search engine optimization. Videos are becoming more and more popular as an alternative to writing a blog post, with users opting instead to quickly film themselves discussing their latest thoughts or ideas. This is sometimes

referred to as "vlogging" (video blogging). Some firms have really embraced this and taken the lead in the industry, including WithumSmith+Brown and Brown Smith Wallace. Although their videos are vastly different, both do a great job of sharing information with a great deal of firm personality. If you have staff who enjoy being in front of a camera and have something (of quality) to say, consider trying your hand at a few videos.

- *Google+ (www.google.com/business).* This is Google's answer to social media. Its format is a hybrid of Twitter and Facebook, allowing you to post photos, comments, videos, and links while also following others. The audience on this site tends to be very tech-oriented, so depending on your target market, you may or may not see much interaction here. That being said, we highly recommend that you create a Google+ account, even if you only passively post in it and never fully interact. The reason is that because this is a Google offering, it can only help your ranking on Google's search engine. Although they'll never officially go on record saying this, it's widely accepted that Google likes it when you play with their toys. Plus, when you create a Google+ account, you gain the ability to secure your business location via Google Maps. This means that when someone runs a search for a business with your services in your general area, you will automatically show up as an option via map listings.
- *Hootsuite (www.hootsuite.com).* This is not a direct social media platform but instead is a social media aggregator. By this I mean that you are able to connect to all your different social media accounts through one platform, Hootsuite, for efficient access. So if you have a blog post on your website that you'd like to share across LinkedIn, Facebook, Twitter, and Google+, instead of having to login to each account separately, you just login to Hootsuite, input the link, and hit send, and it goes out to all at once. Plus, you can also schedule your posts in advance. So if you have three blog posts to share but would prefer to space them out, you can go into Hootsuite, input your links, and then select the various dates, times, and accounts you want to use for each post. It's such a time saver!

SOCIAL MEDIA IN THE LONG TERM

Social media can be a great tool for creating awareness of your firm and keeping in touch with your client base in a more casual manner. You have the ability to share information about your firm, content you create that demonstrates your knowledge, and links to interesting content your

client-base may enjoy, and you can showcase the culture of your firm all while doing so in a cost-effective manner.

Participating in conversations and sharing articles you write will keep your name top of mind among referral sources and information seekers and add to the awareness that you are leaders in this area. It's also a good way to establish goodwill and build relationships that can lead to new business. And by sharing links housed on your website, you drive additional traffic to your site, which helps to improve your search engine optimization (discussed in greater detail in chapter 9).

Different people prefer different methods for getting news and information. It's important to place yourself in as many places as is feasible to increase the likelihood of someone stumbling across your firm. Links to all social media accounts should be placed on your website's landing page and contact page as well as in the email signatures of all employees to increase awareness of your participation on these platforms.

Not every social media platform will be all things for all people. Twitter may work wonderfully for you while YouTube and Facebook won't, and vice versa. Look at your firm's current business objectives and review the social media options to see which ones make the most sense for your firm and your goals.

It's not quantity that counts—it's quality. Although you're likely a numbers person, don't just look at the numbers to determine whether your social media efforts are doing anything for you. You won't gain thousands of followers overnight, and when you do gain some, it may only be a handful to start with. What's important is making sure you are sharing engaging content that keeps you top of mind for when your followers, whatever their number, do have a need or when their friends or neighbors have a need. Don't forget the fact that those few extra clicks to your website each month help your search ranking. You may not get an immediate "sale" from your efforts, but building firm awareness and establishing yourself as a thought leader is incredibly valuable.

Social media changes practically daily, so although one platform may be where everyone is today, tomorrow the crowds and attention may shift somewhere else. The social media merry-go-round can be a bit of a moving target, but it provides incredibly worthwhile benefits when used properly.

In the next chapter, I'll talk about search engine optimization, or improving the placement of your sites in an online search. I'll also talk about analytics, which will show you how your efforts are paying off. It's not all about words; we'll get into the numbers too!

Interview: Karen Toner, Baker Tilly (formerly ParenteBeard)

Karen started in her position as communications manager at ParenteBeard in September of 2012. As communications manager, her role included all external communications, public relations, and social media to increase the firm's exposure. On a daily basis, she would write content for the firm website, collateral, and industry newsletters, as well as plan and post to the firm's eight social media outlets. On October 1, 2014, ParenteBeard merged with Baker Tilly Virchow Krause (Baker Tilly) to form one of the country's top 12 accounting firms.

What made you decide that you wanted to add Twitter to your marketing mix?

We decided to add Twitter in January 2013 because of its growing popularity and discussion of it within and outside the firm. It gave us a great place to share information on the firm's community involvement and connect with our external stakeholders and interested parties. Additionally, our recruiters found that college students were no longer visiting our Facebook page for job posts and information on our events; the demand had shifted to Twitter. So we started posting regularly (more than once a day) until the firm's recent merger.

In what way do you use Twitter most?

We used Twitter to post our job openings and recruiting calendar, connect with universities by showcasing the achievements of their alumni who work at the firm, demonstrate our community involvement, show our accounting industry expertise by linking to our thought leadership, and publicly recognize our team members for their achievements (such as passing the CPA exam or being honored with a community award). In addition, we help the CPA societies by re-tweeting their posts.

We also hosted two well-received tweet chats. The first one focused on how to break into forensic accounting. One of our partners answered questions in real time about required credentials and offered tips on how to lay your groundwork for a career in this field. We even engaged with several accountants who were thinking about changing to a forensic focus. The second tweet chat featured five of our tax team members who responded to questions about the role and responsibilities of a tax accountant on an everyday basis. Both of these chats were well-received by potential candidates.

How do you manage your presence on Twitter?

We manage our presence by limiting our involvement to approximately two to three retweets and favorites a day and following a strict

schedule. For example, Monday we post a thought leadership article, Tuesday we post industry news, Wednesday we post information on an upcoming CPA conference, and so forth. We also schedule tweets in advance by using Sysomos. HootSuite is another scheduling program that allows you to schedule posts in advance. The key is to be careful. For instance, we ran into a challenge when scheduling posts about our recruiter's college visits in the winter of 2014. Due to inclement weather, several events were cancelled, and we would have to remember to change the post before it went live.

Was it tough to get buy-in from your firm leadership or other accountants at your firm? If so, how did you overcome this?

Yes, it has been tough to get buy-in from some of the accountants and firm leadership. We overcame these objections by demonstrating the value of sharing our community work and consistently reiterating that it helps to build our brand. We also remind them that Twitter is virtually free outside of paying for someone's time to manage it.

Who do you follow and why?

We follow all of the industry professional and state societies, as well as the niche groups (AICPA, PICPA, TSCPA, CFA Institute, and CFE). We follow all of the media that cover the accounting industry, including the local business journal reporters and *Accounting Today* and *The Wall Street Journal*. We also follow the universities where we actively recruit.

What has been the return on investment from your Twitter presence and activity?

We have not pinpointed the exact financial return on investment. Our Twitter efforts have been more about brand building and recruiting. However, it was nice to hear from a young tech entrepreneur whom we were actively pursuing as a client that he "sees us out on Twitter and enjoys reading our posts." This was our confirmation that the next generation of business leaders rising through the ranks want to do business with firms that they see as progressive and open to new ways of communication and brand positioning, like Twitter.

What advice do you have for those just getting started on Twitter or looking to expand their use of the platform, particularly those in smaller firms?

For those just starting, spend at least one full month just re-tweeting, "favoriting," and following others. This will make you more comfortable when it comes time to start posting. Next, create a list of hashtags to check on a daily basis. For example, #accounting, #cpa, #tax, #cpaexam,

(Continued)

#accountant, and #finance. By regularly following these hashtags, you will have a better sense of who the industry's top Twitter contributors are. You can then follow them and keep a close eye on their tweets. Finally, stick to a schedule and give each day of the week a different focus. Whether it be a Tuesday Tax Tip or Friday job post, the schedule will help you stay organized.

CHAPTER 9

Driving Traffic and Measuring Success: Search Engine Optimization and Analytics

No discussion of online marketing would be complete without talking about search engine optimization (SEO) and website analytics. Both areas can be confusing, yet both are powerful tools for your firm and its marketing strategy. This chapter will examine both.

Let's discuss SEO first.

RANKING HIGH: SEO

Put simply, SEO is doing certain things to your firm website that will increase its chances of showing up in an organic, or unpaid, web search. Sounds great, right? Of course you would like your firm to show up above your competitors when potential clients are searching for the

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services you provide. The challenge comes in the "doing certain things" part of that definition. What exactly are these "things" of which I speak?

The Evolution of SEO

Nearly as long as there have been websites and search engines to help us find them, people have been trying to figure out ways to ensure that their websites show up near the top of the list of search results. Depending on who you talk to, it's either a smart strategy to get the most from your website investment or a way to game the system. At first, the search engine "spiders" (a program that "crawls" the web finding and indexing websites for search engines like Google and Yahoo) could only "see" the text on a website, so websites that had the most searched-for words on them would get ranked highest. It didn't take long for SEO experts to realize that the more you repeated a particular word or phrase, the better you'd rank. This led to what is called "keyword stuffing," which was simply repeating the same word or words over and over and over. It was not uncommon in the early days to see a row of keywords at the bottom of pages, and some even still use this long outdated strategy today. This is to their detriment because search engines have become smarter and will now punish sites based on these sorts of maneuvers, but we'll get to that later.

Some sites went beyond these obvious tactics in their efforts to trick the search engines. Two such tricks include hiding text on the site and cloaking. Hiding text was really pretty easy to do. Site builders would simply create a long list of keywords and phrases and then "hide" them on the site by making the text color the same as, or very similar to, the background color of the page. So what a visitor might just see as white space on the site would actually be a ton of hidden words that the search engine spiders would see and count. Cloaking was a bit more difficult and involved creating two sites: one for the spiders and one for humans. The site would recognize who was accessing it and show one site to the humans and another to the search engines. Obviously, companies like Google and Bing weren't pleased with this trickery and would punish sites that used these wily tactics. But don't think that only unscrupulous companies were doing this sort of thing. In fact, in 2006, both BMW Germany and Ricoh Germany were caught and removed from all searches as punishment. It didn't take long for both companies to apologize and eliminate these practices.[1]

In time, the search engines recognized what was happening and changed the algorithm to catch the sites that were trying to outsmart the engines. In the late 90s, they started putting much more stock in links, particularly incoming links. The more links your site contained, the more legit it

[1] www.seochat.com/c/a/search-engine-news/beware-the-google-death-penalty/

looked. The idea was that if recognized sites were willing to be associated with your site, then it must be a good site. For example, if someone at your firm had written an article for a highly read and respected online publication that then linked back to your site, this was SEO gold. Many saw this as an opportunity to yet again try to pull one over on the engines and began linking to all sorts of sites, including ones that had nothing to do with their business. This practice may have worked for a while, but the ruse was uncovered. Eventually, the algorithm was changed once more to recognize legitimate links versus fake ones.

As you have probably figured out by now, SEO is little more than a game where the search engines try to ensure that the best sites with quality content show up in searches ahead of sites based on fluff and efforts to trick the search engines. It's important to know that although some are definitely just trying to game the system, not all SEO experts are crooks. True SEO professionals have an excellent understanding of the latest algorithms and can show you how to properly optimize your site to help you rise above the noise. And with such a multitude of legitimate websites now available to internet users, it's important that you give some attention to implementing honorable but effective SEO strategies.

Improving Your SEO

There are several ways to improve your site so it ranks higher than those of your competitors. These "white hat" strategies can really make a big difference in your site ranking by using legitimate methods that are meant to endure and make your site stand out. These techniques typically take more time and need to be updated regularly, but the efforts will return results over time.

The buyer needs to beware, though, of those "black hat" SEO methods that attempt to trick the engines for a quick bump in ranking. In many cases, these methods do deliver results faster than white hat SEO, but they are short lived. Once the engines figure out what is happening, they will quickly punish your site by removing it from the rankings entirely. It takes a good deal of effort to come back from this sort of penalty, and no firm wants to be associated with shady business practices, particularly a CPA firm. Any service provider who promises to get you at the top of a search in a hurry should be avoided.

By no means do I share this information to scare you or attempt to make you avoid SEO as a marketing strategy, but you do need to be careful who you hire. If you are considering hiring an SEO expert to work on your site, do your research and get references. In fact, Google itself recognizes the importance and legitimacy of proper search optimization, and the company recommends that you ask the following questions

when vetting SEO experts.[2] By the way, I highly recommend you read the entire article when you get a chance:

- Can you show me examples of your previous work and share some success stories?
- Do you follow the Google Webmaster Guidelines?
- Do you offer any online marketing services or advice to complement your organic search business?
- What kind of results do you expect to see and in what timeframe? How do you measure your success?
- What's your experience in my industry?
- What's your experience in my country (or city)?
- What's your experience developing international sites?
- What are your most important SEO techniques?
- How long have you been in business?
- How can I expect to communicate with you?
- Will you share with me all the changes you make to my site and provide detailed information about your recommendations and the reasoning behind them?

Once you start doing your research, you will quickly uncover the fact that there is a vernacular around SEO that can be confusing. I encourage you to do some additional research, but the terms below should help you get started and not feel like a total dunce when talking to SEO professionals.[3]

Table 9-1: Essential SEO Terminology

Term	Definition
301 redirect	Directs one webpage to another webpage. This allows firms to have multiple URLs that all go to the same destination. For example, xyzfirm.com, xyzcpas.com, xyzaccounting.com, and accountingforbuilders.com could all be pointed to the same site and used in different applications.
ALT text/tag	A description added to an image or photo on a site that allows the engines to see it and index the information. It allows you to include keywords in yet another place on your site and also gives users a description of the image if it doesn't load correctly when they view your site.

[2] https://support.google.com/webmasters/answer/35291?hl=en

[3] http://blog.hubspot.com/blog/tabid/6307/bid/6080/40-Essential-SEO-Terms-Marketers-Should-Know-Glossary.aspx

Term	Definition
Conversion form	A place on your site where you collect information from visitors and a great way to turn site visitors into real leads. These forms are often used as a trade-off where those willing to give their contact information are given access to valuable information like white papers or free consulting.
Domain	The web address of your site. It's a good practice to renew your domain for several years because search engines give preference to those with longer registrations because it shows commitment to the site.
Fold	Taken from newspaper terminology, this is the information that you can see on your site without scrolling, called "above the fold." This is where you should feature the most important messages for both humans and spiders. People may just glance at your site without scrolling, so it's important that your key points are located here. Spiders also tend to look at the information on the top of a page first.
Headings (H1, H2)	Text on your site that is placed within a heading tag. It is often near the top of a page and in a larger or bolder font than the rest of your content.
Indexed pages	Pages that are stored by search engines.
Keyword or key phrases	A word or words that visitors are likely to use when looking for the services you provide. In most cases, people today use "long-tailed keywords" or key phrases when searching for information rather than single words. For example, to get decent results, a user might enter "manufacturing CPA in Chicago" rather than simply "manufacturing CPA." Firms need to identify these words and use them on their site to help improve their search engine placement. (See exhibit 9-1 for tips on how to create your own list.)
Metadata	Data that tells the search engines what your site is all about.
Meta description	A description of less than 160 characters that describes the contents of a web page. This description is often what is seen below the page title in a search.
Page title	The name you give an individual web page that is seen at the top of your browser window. These titles should be descriptive of the page content and use keywords as much as possible.
Spider	A program that searches the web and collects information about websites.

Exhibit 9-1: Building Your Own Keyword and Phrase List

Think like a client. What are the words and phrases they are most likely to enter if they are looking for a firm that provides the services your firm offers. Ideally, ask a handful of good clients to help.

Don't be too broad. Sure, you'd like to show up for the term "accounting," but there's little chance that your firm will win that SEO battle. Think more in terms of specific services you provide or industries you serve.

Add location phrases. Although you probably won't show up for a generic accounting search, you just might show up for "accounting firm in Peoria, IL." Most people add their city when searching for service providers, so include geographic indicators in your key phrases.

Include your firm's "stars." If there are people at your firm who are well-known in the community or other circles, include their names in your keywords, too. This may be how potential clients become aware of your firm.

Test, analyze, and adjust. Much like you should review your analytics on a regular basis, it pays to see which keywords are working and which are not. This will allow you to tweak the words from time to time to further enhance your site's ranking.

The definitions in table 9-1 simply scratch the surface, so if you really want to become knowledgeable about SEO, it pays to do your research. Keep in mind that Google changes the rules *daily*, making between 500 and 600 changes in any given year. This means that on any given day your site might rank 10 for a particular search term at 2 pm and 15 for the same words at 3 pm. It's a moving target, and what works today might not work next week or even tomorrow. This means you may need to take these tips with a grain of salt. With that in mind, here are my SEO 101 tips for accounting firms:

- **Make sure your page titles are descriptive.** Pages titled "homepage" or "welcome" are no longer indexed by Google and won't show up in a search.
- **Create alt tags for all images used on your site.** It improves your ranking but also gives vision-impaired visitors who use text-to-speech software to access the internet the information they need when they come to your site.
- **Do not use duplicate content.** Sites that repeat information from their own, or other, sites will often be eliminated from search

results. Google tries to give credit to the original source of a particular piece of content and doesn't include those that are repeating the same information. This includes canned articles or blog posts that are purchased. You can try to avoid being kicked out of search results by revising content that shows up on other sites, but this is no guarantee, and there is no "rule" for how much needs to change.

- **Renew your domain** and make sure it is reserved for a minimum of 12 months, ideally more. The closer it gets to expiring, the more wary Google will become of your site and its longevity.
- Using keywords and phrases is a great way to help optimize your site, but they need to fall naturally in your copy. In other words, **write for humans and not for search engine spiders**.
- **Have an active social media presence.** It's not only a great way for you to gain visitors and reinforce your firm's branding, but your active presence on these sites also helps optimize your online presence. Facebook, Twitter, and LinkedIn are high traffic sites, and the search engines like to see your firm interacting with your audience because it shows that you are a legitimate business. Additionally, Google now indexes status updates, which increases your overall optimization.
- **If you are going to have a blog, build it into your website** rather than on a separate platform for the highest SEO results.
- Finally, and I can't stress this enough, **make sure the content on your site is well written and updated regularly**. Believe it or not, Google will penalize you for grammar mistakes and poor writing. On the flipside, it will reward you for adding good content to your site on a regular basis. When the spiders go out looking for information, they look for new content first, so sites with blogs or other pages that are updated on a consistent basis will rank higher than stagnant sites.

As you've probably surmised, SEO is a moving target but can be a valuable weapon in your online marketing arsenal. Once you've built your website and optimized it, how do you tell what is working, what is not, and what needs to change? Here's where analytics come in to play.

A PEEK INSIDE YOUR SITE: ANALYTICS

Would you like to know how well your site is performing? Curious what pages get the most visitors or which ones get read the most? How about which external online sources direct the most visitors to your site? Or even the age range of most of your visitors?

All of this (and so much more) is available to you by reviewing your site's analytics. Different analytics programs exist, but by and large, Google Analytics is the most used because of the access it has and the fact that it is free. If your site doesn't have Google Analytics installed, run, don't walk, to your webmaster and tell her to install it now. The sheer power of the information you can get from this free tool is incredible, and I'm often surprised to find that few firms have it installed at all, or those that do don't regularly review the information it contains.

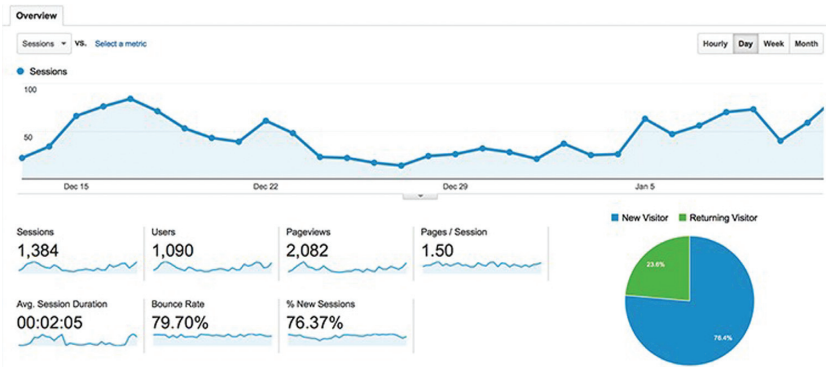
Reading the Numbers

Now that you have your website analytics at our fingertips, what do you do with it? Each analytics program varies a bit, but most are pretty similar. Because Google Analytics is the most common, I will use that as a point of reference for the rest of this chapter.

The best way to get to know Google Analytics is to jump in and start clicking around. It can be overwhelming at first, but the amount of information this tool contains is truly amazing and often enlightening. It tells us all kinds of things about our site that we would not otherwise know. And it's not biased in any way. Unlike people, who may have different motives and opinions, your analytics are simply an unbiased report of activity. Nothing more, nothing less. Members of the accounting profession usually love to have access to the numbers that describe the performance of their website, even if they don't necessarily like what those numbers may say. So what can you learn?

The first page you come to when you log in to your analytics account is an overview of your site activity as shown in figure 9-1. Illustrated with colorful graphs and charts, this page offers you a lot of information at a quick glance. The chart at the top of the page shows you the number of sessions that have occurred over the last few days, weeks, or months. You can even get the information down to sessions per hour if you choose. Sessions are the same as visits in Google Analytics and are a count of when someone comes to your site. Regardless of how many pages the visitor goes to, or in what order, it counts as one session. This overview shows you the days that your site is visited the most and how it has changed over a particular period of time. For example, if your firm adds a new blog post every Tuesday and you notice that your visits spike on Tuesdays, this is a good indication that your blog is drawing more traffic to your site.

Figure 9-1: Analytics Overview Page



You can change the dates that are shown in this histogram or the parameters based on what you are looking for. Besides sessions, you can view reports and charts for the following:

- *Users.* Previously called "unique visitors," this is a measure of individual visitors to your site over a defined period of time. The more users, the more people who come to your site.
- *Page views.* The number of times visitors show up on the pages of your site, measuring the pages that are the most popular.
- *Pages per session.* An average of the number of pages site visitors view per visit to your site. The higher this number, the more pages they are viewing while they are on your site.
- *Average session duration.* The average amount of time each visitor spends on your site per visit. The higher this number, the better.
- *Bounce rate.* The percentage of sessions where a visitor only views one page of your website before leaving. The lower this number the better because you want users to go to more than one page in most cases.
- *New versus returning visitors.* A new visitor is someone who has never visited your site or hasn't been there in a long time. Thus, a returning visitor is someone who has been to your website before. There is no hard and fast rule for how this ratio should look, but you definitely want both new and returning visitors to your site.

As you can quickly see, no single measure paints a full picture of your site traffic. Also keep in mind that this is just the first layer of information available. Although there are some general guidelines listed, these rules are not set in stone. Let's dig a bit deeper now.

In the left column of the analytics site, you'll notice a number of reporting options you can peruse. We won't spend time talking about all of

them—that could be a book unto itself—but I do want to discuss a few of the more popular and informative ones.

Audience

Have you ever wondered who visits your site? This report will give you that information. It does not tell you *exactly* who has been there, but you can learn a lot from the information it does tell you.

Under **Demographics,** you will see a breakdown of the gender, age, and interests of your visitors. By reviewing this information, you can learn the demographics of the people who like your site and to whom it appeals. If you are targeting young women but find that it is old men who are visiting the most, it's time to take another look at the design and content of your site.

Clicking **Geo** will give you information about the location of your visitors and the language they speak. Most firms are surprised to find that they have quite a few visitors from countries outside of the United States and who speak other languages.

Next comes the **Behavior** category. This tells you what people are doing on your site in general. You can view deeper information on your new and returning visitors, including how long their sessions were and how long they stayed on your site. Frequency versus recency measures the number of visits and how long it's been since a returning visitor has been to your site. Engagement measures how much your site occupied your visitors. On this page, you'll see session duration, the length of time they stayed on your site during a particular visit and page depth, how many pages they clicked on your site, or how "deep" they went into it. Both of these parameters are visible for sessions and page views, so you can really start parsing visitor information by careful review of these numbers.

Technology provides details about the browsers or operating systems that visitors use to access your site as well as their internet provider. This might seem like superfluous information, but it is often interesting to find out that more users access your site via Chrome now than Internet Explorer. It's important to know that many sites were not built with browsers other than Internet Explorer in mind. If your site is more than a few years old, you may want to test it on these newer browsers to make sure it looks as it should and navigates properly. If not, it's probably time for an update.

Much like technology, **Mobile** gives you information about how people are accessing your site. The overview shows you percentages of visitors from desktops, mobile phones, and tablets. **Devices** goes into additional detail about the type of mobile phone or tablet that is used. As we

mentioned in the chapter on websites, this number is consistently increasing. So if your site isn't built to be mobile responsive, it might be time to make it more friendly to those accessing it with mobile devices.

Have you ever been curious to see how users travel through your site? **User Flow** will give you that information. This section shows you just that: where they enter, where they go next, and so on. This is very valuable to see if there are particular pages or posts that bring in more traffic and if those who come in through that gateway tend to leave quickly or stay and click around for a while. You can spend hours looking at all the information contained in these visual displays, and it will give you useful insights for enhancing your site.

For example, one firm we worked with started reviewing their analytics and noticed that most of their traffic was coming to their site via their blog posts, which were placed on their social media pages, but leaving immediately after reading them. To encourage them to explore other pages within their site, they started adding links to the bios of the blog authors and links within the post to the services pages that were pertinent to the information being shared. This gave readers an easy way to click through to learn more about what the firm offered and about the partners. Another firm noticed, not surprisingly, that the bio pages were the most read on the site (other than the home page). To encourage further site exploration, they added links to the services that each partner provided as well as a list of the blog posts and articles that a particular partner had written. Both help those who want to learn more do so much more easily.

Acquisition

This main section is all about where your visitors come from and what they do when they get there. You can tell a lot on the **Overview** page of this section, including your top referral channels for new versus returning visitors and the bounce rate, pages per session, and average session duration for visitors from each referral source.

Diving deeper, **Channels** shows you the percentage of visitors that come from an organic search (searching for keywords or phrases that bring up your site), direct (those who type in your domain directly), referral (those referred from another site to yours), email (those who came to your site by clicking on your link contained in an email or e-newsletter) or social (those who arrived at your site through a social media page). I don't have to tell you that knowing how people get to your site can help you better allocate your resources in ways that bring more results.

All Traffic goes a bit deeper to show you exactly where the traffic to your site originated, including search engines, social media pages, and other referring websites. **All Referrals** eliminates the search engines from the

listing and focuses only on the referring sites. It is interesting to note that firms are often surprised to find out that the referring sites are not what they expect and may even be sites that they have never heard of.

Behavior

This section tends to focus more on your visitors' activity within your site once they are there rather than how they got there in the first place. The histogram at the top defaults to show page views over a period of time, but you can also take a look at average time on page, bounce rate per page, and percent that exit from that page. You can see which pages get the most views on your site and thus determine what type of information is most interesting to your readers. You can also see how many people are using your in-site search feature if you have one.

Within the Behavior section, you'll see **Site Content** first. This goes into greater detail about the most read pages within your site and includes average time, bounce rate, and exit percentages from each of those pages. You'll also see that not everyone comes to your site through your home page but quite often through another page that gets a higher ranking.

Beyond that information, you can view how fast your site and its individual pages load and get suggestions for improving load time if it is not as fast as it should be. Load time is more important than you might think. Be honest: have you ever been on a site that took more than a few seconds to load and you just decided "To heck with this!" and clicked out because you just didn't have the time? You're definitely not the only one who refused to wait for a slow-loading page, so work to ensure your website is accommodating people's increasingly busy and fast lives.

Believe it or not, we are just scratching the surface of the type of information you can glean from Google Analytics. The more you click around, the more you'll be surprised at what you find and what you can learn. In addition to viewing the information online, you can also export pages in a variety of file formats or even set up automatic emails to send you the information you want to see on a regular basis. One note on use: you must have a Google email address to access the system. This includes a gmail.com address or a Google-hosted account. Many people have to create one just for this purpose, but it is more than worthwhile for the intelligence it will provide. Don't let it overwhelm you either. Consider reviewing a new section each time you visit, slowly expanding the information you access. Knowledge is power, and with the knowledge you can gain here, you'll be able to reap the full potential from your firm's online activities. See exhibit 9-2 for a guide to getting started.

Exhibit 9-2: Jump Start Your Analytics Review

I've listed a few ways for you to review your analytics and how you may want to react based on what you see. This is just a start, so continue to expand upon my list once you get familiar with the information:

- *Traffic by day.* Over time, see if there are particular days of the week that bring in more traffic than others. If so, what are you doing differently on those days? See if you can repeat that activity on other days to bring in even more visitors.
- *Referral sources.* Where does most of your traffic come from? Is it an article that you wrote for a local business publication, Twitter, or somewhere else? See if you can repeat the pattern to bring in more traffic, and spread that same pattern to other referral sources as well.
- *Travel patterns.* How do visitors travel through your site? Do they enter on your home page then go directly to a partner's bio? Or do they tend to click to a service area description? If there are pages you want them to visit more than others, feature those pages on your home page so they are easy to find.
- *Session duration.* Are there particular pages that seem to hold visitor interest more than others? How is the information on that page different? Is it written in a way that encourages them to stay? Does it contain videos that peak their interest? Can you repeat the formatting and content arrangement on other pages of your site so visitors stay there longer too?
- *Devices used.* What percentage of your visitors is accessing your site using a phone or tablet? Is this number low because your site isn't easy to read or navigate with a mobile device? If so, consider having your site rewritten to be responsive to the device that is accessing it.

Now add your own to the list. See what information you find the most enlightening and how you can interpret it and expand upon it to improve your site traffic and engagement.

Interview: Stephanie Crawford, Wiebe Hinton Hambalek, LLP

Stephanie started with Wiebe Hinton Hambalek (WHH) right after she graduated from college with a degree in agriculture communications. In the Central Valley of California where she lives, most people have a hand in the agriculture industry, and WHH has a strong niche in the area. Prior to Stephanie joining the firm, they did not have any formal marketing, so she came on as a Jill-of-all-trades, which is often the case at smaller firms. They had recently rebranded, so Stephanie quickly got to work creating a modern website as one of her first tasks.

What made you start pursuing SEO for your firm, and when was it that you did?

Our new site had just gone live when I attended the Association for Accounting Marketing national conference in 2012. I sat in on a session about SEO and learned so much. When I came back from the conference, I immediately reached out to our site developer and said I wanted to add keywords, metadata, and other seemingly simple things to our pages. They responded by saying it's "too complicated," but I could buy a full SEO package from them if I wanted. Not having budget and unsatisfied with their response, I decided to figure out how to add keywords and such on my own. I started with HubSpot's free website grader tool, which gave me a list of action items. I then researched each item to determine if it was something I could address on my own. After that, it was a matter of doing a good deal of reading on various forums and blogs and watching videos to learn what I didn't know.

Was your goal to optimize for a specific target audience or promote one service in particular or to simply get more traffic to the site as a whole?

I didn't know enough at the time to be strategic about it, but I knew I was adding a blog post every week and it needed keywords. We had three industry niches, and I needed to add content for each of them and wanted to get as much mileage out of these posts as I could.

What have been the results of your site optimization, and how often do you adjust it? Are there particular pages that you focus on more than others?

I go back and optimize the pages *[by employing the white hat tactics discussed earlier in this chapter]* as often as I can, but can't as often as I'd like. Every time I post a new article, I make sure it's optimized as much as it can be and update all the internal links. Just doing the basic stuff can make a big difference, especially if your site is built on a platform like WordPress. It's not that hard to get started, and it gives you a way

to show the partners numbers. We all know how much they love seeing numbers!

How often do you review your site's analytics?

I glance at it multiple times a week and review trends once every two or four weeks.

What are you looking for most?

I want to see what sort of traffic is going to new posts and make sure Google indexes them. I review where the traffic is going overall as well. We just did a full audit of our site, and it helped me uncover pages that were not optimized, which explained why they weren't getting any visits.

What has been the most surprising to you about how people use your site?

After we started writing more specific real estate niche content, we got significantly more calls from people who had found us because of our website. I was also surprised by our site referrals. It turned out that Twitter was sending a huge amount of traffic to our site. I was about to quit using Twitter because we had very little engagement, but we were getting a lot of site referrals from the platform as it turns out, so it was worth the time and effort.

What advice do you have for those who would like to dip their toes into these areas but have no idea where to start?

Just do it and don't worry about messing up your site. Most of the content management systems that are used today are very user friendly. Also, do a thorough website audit or have one done by a qualified professional. This will help you uncover any problem areas and also identify the areas that are worthy of a bit of your budget. I found that our return on investment was much quicker with SEO than more traditional marketing methods. In addition, the prospects that come from a well-optimized site are more qualified.

Chapter 10
The Future Is Now: There's No Looking Back

So here we are. We've discussed SEO and social media, blogging and content, your website, and your reputation as a thought leader. You've seen the evolution of accounting marketing from its very first forays into the vibrant, dynamic world of online opportunity that exists today. What more is there?

The answer is that we don't know. No one does, but we do know that change will be constant and rapid. Part of what's different today from the early post-Bates years is the sheer speed with which the marketing climate shifts and blossoms. New social media platforms are a certainty, and it's more than likely that brand new ways of communicating will burst upon the scene in the years to come. When you began your career, would you have imagined tweeting—on your smartphone, no less—as a way of sharing your professional insights and communicating with clients? If so, you should become a soothsayer because nobody else saw it coming, just like so many of the channels available to us today.

The trendlines point to future opportunities for communicating directly with a more and more precisely targeted audience. It will almost certainly become even easier to gather granular data about individuals and businesses that would be an ideal match for your services. Social

Take Your Marketing Online!: Proven Ways to Grow your Firm in the Digital Age, 2nd Edition. Bonnie Buol Ruszczyk, Kelly Lucas and Sarah Warlick.

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media platforms will rise and fall, and various apps, formats, and other online meeting spaces will come to dominate the public consciousness in their own rhythms. These elements change quickly, so it is critical that you keep abreast of the ebb and flow of online venues.

Because of the rapid pace of change, it's not wise to consider any particular balance of tactics as a permanent solution. LinkedIn and Twitter may be the perfect complements to your website and blog this year, but they may not be the best way to spend your resources and time two years from now. It's simply impossible to make concrete plans involving online marketing for the long term!

What remains stable is the need to plan your approach, measure your effect, and communicate clearly the messages that will resonate with your target audience. Where you aim those messages and the precise way you target them must be a function of your firm's differentiators matched to the online channels of the moment. The planning, measuring, and communicating will remain at the crux of any marketing success you hope to find for your firm.

"The planning, measuring, and communicating will remain at the crux of any marketing success you hope to find for your firm."

Learning about the various analytical tools available to you and becoming adept in their use will continue to be a valuable investment of time. Firms that expect to tailor their message and delivery for maximum efficiency must be able to interpret the vast information gathered by such tools. And, again, expect new tools that allow even more precise data gathering and analysis to appear on the horizon with regularity because they are most certainly in the development pipeline.

As you plan your online marketing strategies and campaigns, keep in mind that it's not just about your firm and your clients, although those are the stars of the relationship. The dynamic relationship between your firm and clients will also be influenced by the broader conversation and mood that permeates society at any point. And that, conveniently enough, is something you can easily monitor and participate in through the ever louder, more powerful, and more connected online world.

The other certainty is that online marketing is here to stay. It is not a flash in the pan or a fad that's reached its heyday and likely to fade into oblivion, only brought out at "retro" parties and clung to by the sadly out of touch. No, the power of the interconnectivity of people and brands all over the world is here to stay, pulsing and flashing through the Internet.

Today's young people, who will inevitably grow to fill the ranks at your accounting firm, don't remember a time when they couldn't Google the

answers, text a friend, and monitor the meme of the day. You can shout at them to, "Get off of my lawn!" as much as you like, but they can't hear you over the buzz from their headphones. The Internet is the hive, and the hive hums with a vibration that reaches into the deepest crevices and recesses of society. You must raise your voice within the hive and become a part of the buzz. It is, truly, the only way to be fully heard in the 21st century.

Firms that haven't gotten on board with digital marketing will do so, or else they will lose relevance as they lose clients. When online searches are as powerful as word of mouth referrals, it's time to admit the die is cast. You need an online presence. It's no longer a matter of *if*; it is absolutely a matter of *when*.

Having accepted the new reality, you might as well have some fun with it, right? And that's where I hope this book will be useful. Whether you picked it up because you were excited about the prospect of learning more to enhance your ongoing digital marketing efforts, or whether you grudgingly read on, suspecting and dreading the truth, I want you to see the wonderful opportunities that exist and recognize that there's a lot of scope for self-expression and growth even as you work hard to promote your firm. It isn't always simple, but it is always interesting. There's plenty to learn. No matter what your preferred style, there is a place for you to do what you do best and love most somewhere under the big tent that makes up digital marketing. Your firm has everything to gain by entering this exciting new world. Welcome!